

Oracle® Human Resources Management Systems

Deploy Strategic Reporting (HRMSi)

Release 11*i*

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HRMS Glossary

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Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi), Release 11i Part No. B14374-01

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle HRMS.

If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Related Documents for more information about Oracle Applications product information.

See Related Documents on page x for more Oracle Applications product information.

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Structure

- 1 **Strategic Reporting**
- 2 **Implement Strategic Reporting**
- 3 **Deploy Strategic Reporting**
- HRMS Glossary**

Related Documents

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Embedded Data Warehouse Implementation Guide

This guide contains all information necessary to implement Oracle Embedded Data Warehouse in your environment. It contains technology components, system requirements, and task and reference information.

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 5.6 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration in Oracle HRMS

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to successfully implement Oracle HRMS in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Human Resources Management Systems Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Implementing Oracle Approvals Management

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications. Download this guide from Oracle *MetaLink*, Note: 282529.1.

Oracle iRecruitment Implementation Guide

Set up Oracle *iRecruitment* to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Set up and use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user document, instructions for applying patches, new and changes setup steps, and descriptions of software updates, refer

to the "About" document for your product. "About" documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle HRMS implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*.

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. this manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

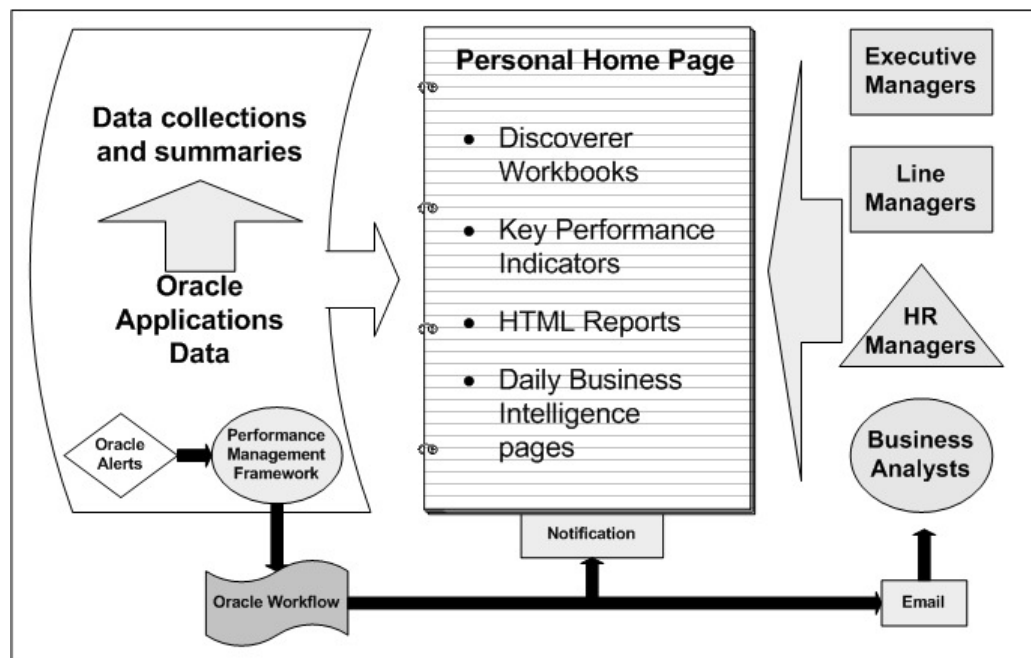
Strategic Reporting

Strategic Reporting Overview

Oracle HRMS Intelligence (HRMSi) is a product in Oracle's E-Business Intelligence System application suite (E-BI) specific to human resources. HRMSi provides a web-enabled suite of strategic reports that provide summaries and details of HRMS application data. It also provides the tools to create your own reports.

The aim of HRMSi strategic reports is to enable you to measure, monitor and manage enterprise performance to make better, timelier decisions. To achieve this HRMSi uses a variety of reporting systems and database technologies to provide reports across the range of HRMS functionality.

The diagram below provides an outline of how HRMSi reporting modules work together to provide a range of users with strategic reports through Oracle Self Service.



Each module is described in detail below. You can choose to implement all, or individual modules, depending on which modules best meet your enterprise reporting requirements.

Discoverer Workbooks and End User Layer (EUL)

HRMSi uses Oracle Discoverer to create workbooks containing worksheet reports and graphs. The workbooks access your application data through a Discoverer End User Layer that organizes your application data into business areas and folders.

The worksheets provide:

- Summaries of your enterprise data.
- Analyses of trends over time.
- Comparisons of workforce changes across your enterprise.

The workbooks are ready to use. However, you can amend any of the supplied workbooks to meet your individual enterprise requirements. You can also use Discoverer User to create your own workbooks, based on the HRMS Discoverer End User Layer (EUL).

For a list of the HRMS Discoverer EUL Business Areas, see Discoverer End User Layer Business Area Descriptions, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

You can find full instructions on developing the Discoverer EUL and creating and maintaining Discoverer workbooks in the *Oracle Discoverer Plus User's Guide* and the *Oracle Discoverer Plus Administrator's Guide*

Discoverer Analytics Reports

Discoverer Analytics reports are Discoverer workbooks based on a set of facts and dimensions, similar to a data warehouse. They are intended for use by business analysts, or those wanting further understanding of HR data.

The HRMSi Discoverer Analytics workbooks and end user layer provide high level summary reports that track trends and statuses across a wide range of data. These workbooks enable managers to compare workforce activity across, for example, periods of time, organizational structures, or across types of employees or jobs.

To provide these high level summaries and comparisons, the analytics workbooks and end user layer rely on summarized data structures that are similar to the structures used in data warehousing. The summary data structures hold pre-calculated data. HRMSi provides a set of programs that you use to populate the summary structures with calculated data from your HRMS transactional tables. You can run the programs as often as you wish to keep the summary data up to date. See: Programs to Populate HRMSi Strategic Reports, page 3- 2

HRMSi also provides a set of analytical workbook templates based on the analytics summary structures so that you can extend the range of analytical reports as you wish. To develop reports using these templates, you need a good understanding of the following:

- Oracle Discoverer.
- The principles of Online Analytical Processing (OLAP).
- The principles of data warehousing.

HRMSi provides a set of business areas in the Discoverer End User Layer to support analytical reporting. For a list of the HRMSi Analytics Discoverer Business Areas, see Discoverer Analytics Business Areas, page 1- 4

Performance Management Framework

The Performance Management Framework (PMF) is central to HRMSi and enables you to assess the performance of your enterprise against predefined targets using Key Performance Indicators (KPIs). The PMF contains forms to identify and store your KPI targets and tolerances, and can automatically generate alerts to notify you that actual values are outside your target tolerance levels. You can also create workflows to take action against these out of tolerance situations. The Performance Management Viewer (PMV) reports enable you to view KPI values and compare them with actual values. In the graph region you can display KPIs graphically to track your KPI trends.

Data Warehouse Module

To complement the transactional reporting capability, the Data Warehouse module contains Discoverer workbooks that are based on Oracle Embedded Data Warehouse (EDW). HRMSi uses EDW to collect human resources data into a number of facts and dimensions (data warehouse structures). The facts are the actual data that you are interested in, such as salaries; the dimensions divide the facts into areas of interest, for example the salary budget per organization, or per job.

The data in the facts and dimensions is structured to more closely match reporting requirements, which improves report performance. The data is not real-time, but only current for the last collection date. You collect the data into the facts and dimensions using load and collection programs. You then determine how often you need to re-collect the data.

See: Processes to Populate the Data Warehouse Module, page 3-18

HTML reports

HTML reports are based on the HRMS transactional tables. They enable you to view data at a high level using a standard web browser layout.

Daily Business Intelligence for HRMS

Daily Business Intelligence (DBI) for HRMS provides information about your workforce and your human resource management processes. It is a comprehensive reporting solution that provides workforce analysis, workforce distribution, and workforce cost visibility. Built on the proven Oracle Human Resources suite of transactional applications, Daily Business Intelligence for HRMS provides executives and Human Resource line managers with a daily view of the enterprise workforce using the HR Management page.

DBI summarizes HRMS data within tables and graphs in the HR Management HTML page. The tables and graphs are based on materialized views and base summary tables. HRMSi provides request sets containing programs to load your data into the summary structures. You can refresh the data daily to keep it up to date.

To make DBI available to your users, you must first set up Daily Business Intelligence. See: *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Other product groups, such as Financials, create pages with reports relevant to their products.

Strategic Reporting Administration

Responsibilities for Strategic Reporting

When accessing Human Resources secure folders in Discoverer, users will only be able to see data if they have a valid HRMS responsibility, that is, a responsibility that is registered to the HRMS suite. Therefore, before users access HRMSi reports, you must ensure that Human Resources security has been set up and that valid HRMS responsibilities have been assigned to those users.

Important: Unless you assign a valid HRMS responsibility to users, they will not be able to see any organization data.

HRMSi provides four standard responsibilities. These are:

- **Human Resources Intelligence – Administrator (OLTP)**

The existing Human Resources responsibility does not, by default, include all HRMSi reports and workbooks, since some workbooks are for administrative purposes. However, the Human Resources Intelligence – Administrator (OLTP) responsibility provides a full list of all reports, workbooks, and KPIs, apart from those in the data warehouse module. This responsibility is for use by system administrators; it should not be accessible to users.

- **Human Resources Intelligence – End User**

The Human Resources Intelligence – End User responsibility provides an example template of how the administrator may want to present reports to users.

- **Human Resources Intelligence – Analytics User**

The Human Resources Intelligence – Analytics User responsibility provides access to all the analytics reports.

- **Human Resources Intelligence – Embedded Data Warehouse**

The Human Resources Intelligence – Embedded Data Warehouse responsibility provides a full list of all workbooks in the data warehouse module.

Note: These responsibilities exclude all of the Daily Business Intelligence content, which has its own responsibility. See: DBI responsibilities and roles, page 1- 5

Analytics Business Areas

The HRMSi Analytics reports are based on a Discoverer end user layer (EUL). The analytics EUL provides folders that access the data from summary tables as well as the HRMS transactional tables. You can use these folders to create your own analytics reports. The analytics end user layer organizes the folders into three business areas, as described below.

- **HRMSi – Administration – Analytic Dimensions**

This business area holds the dimension folders for analytics reporting.

- **HRMSi – Administration – Analytic Facts**

This business area holds the facts folders for analytics reporting.

- **HRMSi – Administration – Analytic Components**

This business area holds the component folders, such as lists and levels, for analytics reporting.

Some of the folders in the analytics business areas hold collected data. This is indicated in the folder name.

The analytics folders are for use by experienced developers who have an understanding of data warehouse structures.

Data Warehouse Module Responsibilities

HRMSi provides two responsibilities for administrating the Data Warehouse Module. These are:

- Global Warehouse Administrator
- Site Warehouse Administrator

DBI Responsibilities

You can access the HR Management page using the following role and responsibility:

- **HR Line Manager:** The HR Line Manager role provides the user with access to the HR Management page and all of the associated regions and underlying reports.
- **Daily HR Intelligence:** The Daily HR Intelligence responsibility provides the user with access to the HR Management page and all of the associated regions and underlying reports.

The reports are displayed based on the Supervisor hierarchy.

DBI for HRMS Data Security

Daily Business Intelligence for HRMS uses the supervisor hierarchy, based on the association between assignment and supervisor in the Assignment window, to secure data.

As an employee you are associated with your Oracle Applications user ID. When you log in, the application authenticates your user ID. In the HR Management page, you are treated as the top line manager in the Manager parameter.

Once logged in, you can view information about your subordinates in the supervisor hierarchy, but not information about your supervisor or peer managers.

For information on standard DBI security, see *Daily Business Intelligence Implementation Guide* on Metalink.

Implement Strategic Reporting

Implementation Checklist (HRMSi)

This checklist provides you with a description of the HRMSi modules you can install. Some of these modules require you to have previously installed the Workforce Intelligence HRMS reports. See the Post Install Steps for more details.

- Daily Business Intelligence for HR, page 2-11 (Optional)

Includes the HR Management page for Daily Business Intelligence. The HR Management page displays high level summary reports and graphs that track changes in your workforce over time for managers within your supervisor hierarchy. From the HR Management page, you can drill down to detailed reports.

- Discoverer Analytics, page 2-4 (Optional)

Includes Discoverer end user layer based partly on collected data and partly on the transactional HRMS tables. The collected data is held in database structures that are similar to data warehouse structures. These structures are the basis of powerful analytical Discoverer workbooks that you can use to analyze changes in your workforce over time and across organizational structures.

- Key Performance Indicators, page 2-6 (Optional)

Includes key performance indicators (KPIs), based on Oracle Performance Management Framework. The KPIs enable you to set targets with a tolerance range. Includes supporting Performance Management Viewer (PMV) reports.

- HTML Reports (Optional)

Includes HTML reports based on HRMS transactional data.

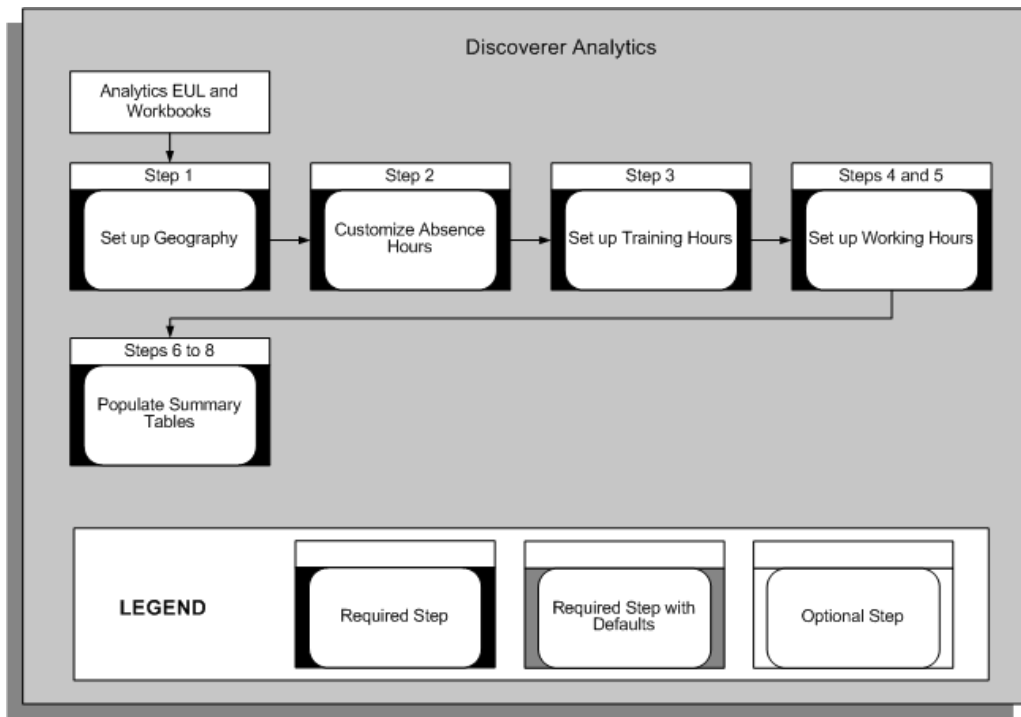
- Data Warehouse Module, page 2-8 (Optional)

Includes Discoverer workbooks and end user layer based on data warehouse structures, using Oracle Embedded Data Warehouse technology.

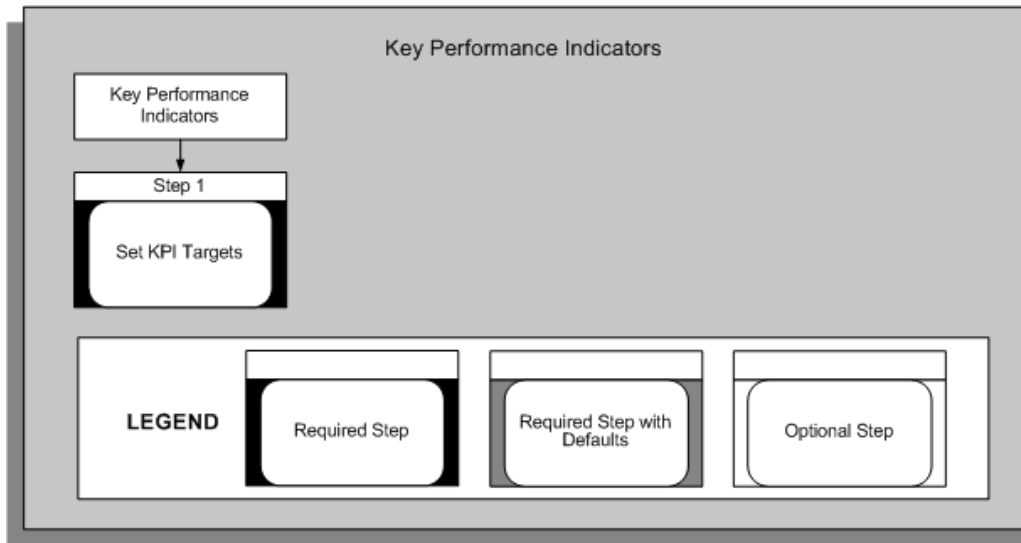
Implementation Flowcharts (HRMSi)

Some of the steps outlined in this section are Required, and some are Optional. Required with Defaults means that the setup functionality comes with predefined, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.

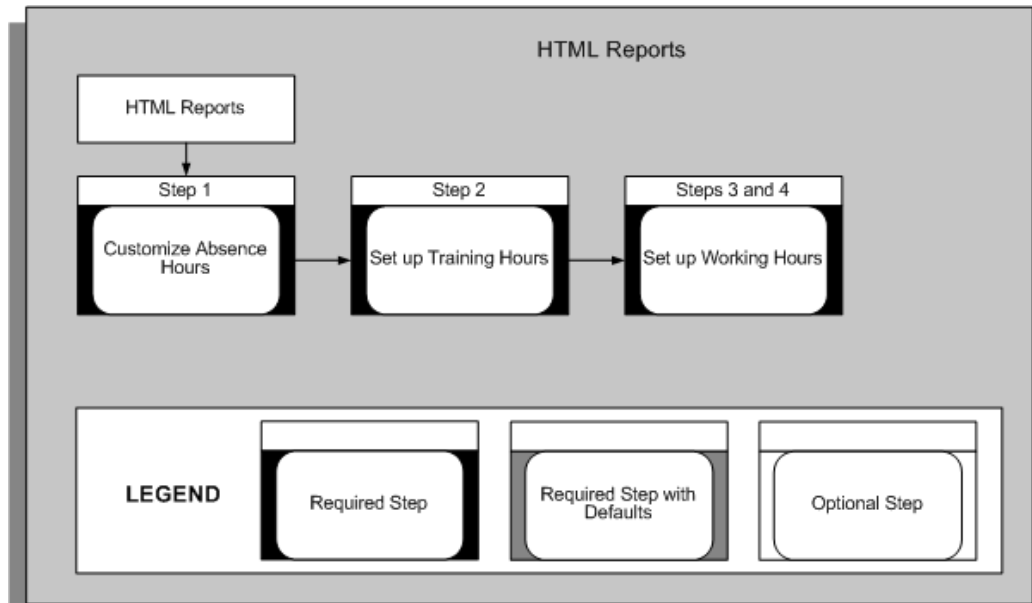
Implementation Flowchart for Discoverer Analytics



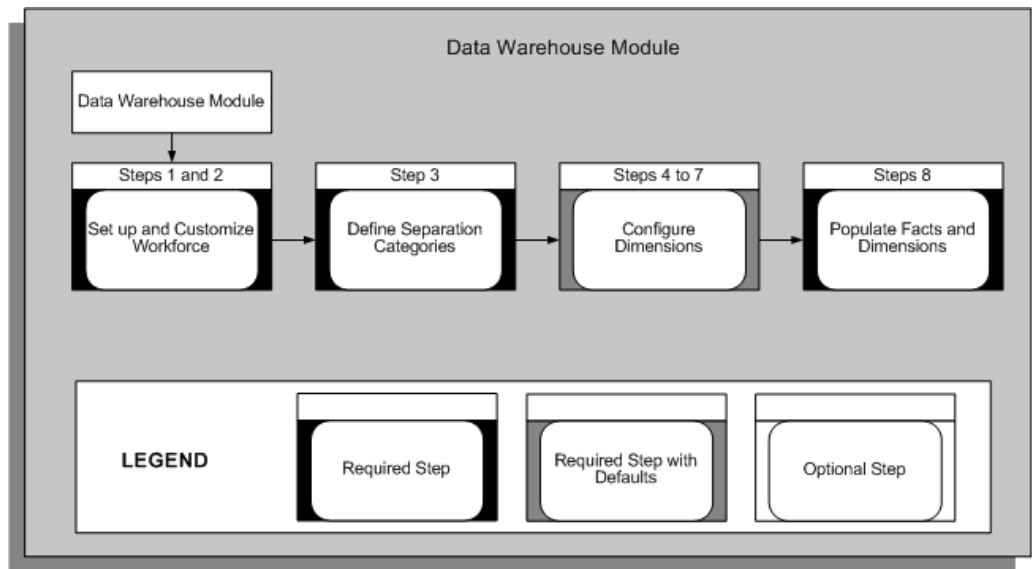
Implementation Flowchart for Key Performance Indicators



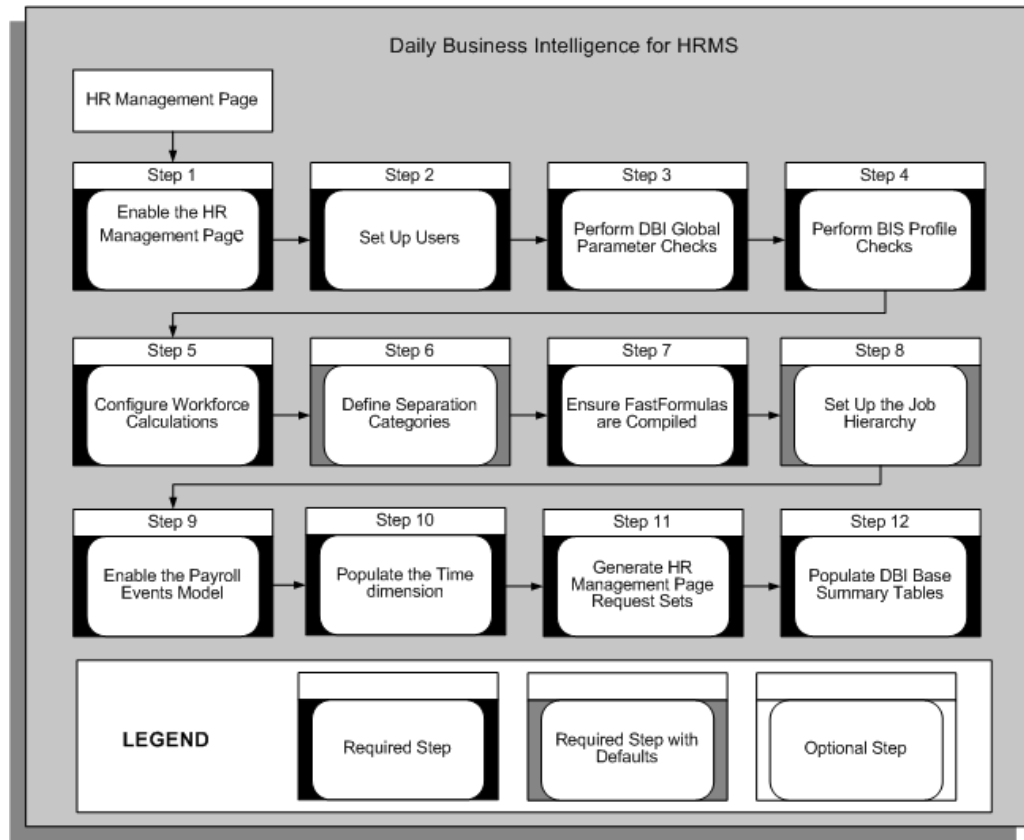
Implementation Flowchart for HTML Reports



Implementation Flowchart for Data Warehouse Module



Implementation Flowchart for Daily Business Intelligence for HR



Implement Discoverer Workbooks

HRMSi provides two styles of Discoverer end user layers (EULs) and predefined workbooks:

- Analytics
- Standard

The Analytics EUL and workbooks provide high level analysis of your workforce, and are mainly based on collected information. This is in contrast to the standard EUL and workbooks, which provide real time information, gathered directly from the HRMS transactional tables.

If you have not already implemented Workforce Intelligence reports for HRMS, you need to perform the steps to implement the HRMS Workforce Intelligence business areas and workbooks in order to use either the Analytics or the standard EULs and workbooks. See: *Workforce Intelligence, Oracle HRMS Implementation Guide*

You should then perform the Analytics implementation steps, below, to use the pre-defined Discoverer Analytics EUL and workbooks.

Analytics EUL and Workbooks

You have to perform these implementation steps to view data in the HRMSi Analytics Discoverer end user layer (EUL) business areas and workbooks. You need to perform

some of these steps periodically, so that the Discoverer EUL and workbooks reflect changes in your enterprise data.

Step 1: Set Up Geography *Required Step*

If you wish to make use of the Analytics Discoverer EUL and workbooks, you need to set up the Geography dimension.

See: Setting Up Geography, page 3- 6

Step 2: Configure Absence Hours *Required Step*

The Absence Hours report, and the Employee Absence Hours Trend Analytics workbook, report on the number of absence hours for each employee. If you do not record the time in hours, the reports use a predefined formula, `TEMPLATE_BIS_DAYS_TO_HOURS`, to convert the time into hours.

If you have not set up standard working conditions for your employees or business group, or the standard working conditions do not provide the number of hours in a day, the predefined template makes the following assumptions:

- Eight hours are worked per day.
- Five days are worked per week.
- Twenty one days are worked per month.

By copying the template, you can amend the working hours rules to those of your enterprise. You can also write a new working hours formula.

If you do copy or replace the predefined template you must name the new template `BIS_DAYS_TO_HOURS`.

See: Writing or Editing a Formula, *FastFormula User Guide*

Step 3: Set Up Training Hours *Required Step*

See: Setting Up and Configuring Training Hours, page 3- 9

Set Up Working Hours *Required Steps*

Step 4: Set Up Working Hours *Required Step*

To report on the number of regular and overtime hours worked by people in your workforce, you need to use Oracle FastFormula to provide information about how you record regular and overtime hours.

See: Setting Up and Configuring Working Hours, page 3-11

Step 5: Adapt Hours Worked Workbook *Required Step*

You need to create calculations in the HRMSi - Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook so it can report on your overtime bands.

See: Adapting the Hours Worked Workbook, page 3-14

Populate Summary Tables *Required Steps*

To ensure the Analytics Discoverer End User Layer and workbooks run correctly and efficiently, you need to run concurrent programs to populate summary tables.

For a full discussion of these concurrent programs, and when you need to run them, see: Processes to Populate HRMSi Reports, page 3- 2

Step 6: Populate the Competence Level Summary Table *Required Step*

You need to populate the Competence Level Summary table with your competence level hierarchy data used by your reports.

Run the concurrent program HRI Load All Competence Level Hierarchy to populate the summary table.

Use the Submit Requests window.

See: Populating the Competence Level Summary Table, page 3-15

Step 7: Populate the Competence Requirement Fact Table *Required Step*

You need to populate the Competence Requirement Fact table with the job competence requirements used by your reports.

Run the concurrent program HRI Load All Competence Requirement Fact to populate the summary table.

Use the Submit Requests window.

See: Populating the Competence Requirement Fact Table, page 3-15

Step 8: Populate the Time Dimension Folders *Required Step*

Analytics workbooks use time elements such as Year, Month, and Week. These workbooks will not return any data unless you populate the Discoverer EUL time dimension folders with time elements by using the Update Gregorian Hierarchy in the Time Dimension concurrent program.

Run the concurrent program Update Gregorian Hierarchy in the Time Dimension to populate the folders.

Use the Submit Requests window.

See: Populating the Time Dimension Folders, page 3-16

Implement Key Performance Indicators

HRMSi provides a performance management framework that uses Key Performance Indicators (KPIs) to enable you to track the performance of key areas of your enterprise and act quickly when this performance falls beyond targets that you have set up.

See: Key Performance Indicators Key Concepts, *Strategic Reporting (HRMSi) User Guide*

If you have not already implemented Workforce Intelligence reports for HRMS, you need to perform the steps to implement the HRMS Workforce Intelligence business areas and workbooks in order to use HRMSi KPIs. See: Workforce Intelligence, *Oracle HRMS Implementation Guide*

Step 1: Set KPI targets *Required Step*

You need to set the KPI targets. The performance management framework sends a notification when actual performance falls short of, or exceeds, the target value.

See: Setting Targets for New Performance Measures, *Oracle E-Business Intelligence Performance Management User Guide*

Implement HTML Reports

This section contains the steps you need to perform in order to set up and configure the HRMSi HTML reports.

If you have not already implemented Workforce Intelligence reports for HRMS, you need to perform the steps to implement the HRMS Workforce Intelligence business areas and workbooks in order to use the HTML reports. See: *Workforce Intelligence, Oracle HRMS Implementation Guide*

You should then perform the implementation steps below to use the pre-defined HTML reports.

Note: If you have implemented the HRMSi Analytics workbooks, you will already have performed these steps.

Step 1: Configure Absence Hours *Required Step*

The Absence Hours report, and the Employee Absence Hours Trend Analytics workbook, report on the number of absence hours for each employee. If you do not record the time in hours, the reports use a predefined formula, `TEMPLATE_BIS_DAYS_TO_HOURS`, to convert the time into hours.

If you have not set up standard working conditions for your employees or business group, or the standard working conditions do not provide the number of hours in a day, the predefined template makes the following assumptions:

- Eight hours are worked per day.
- Five days are worked per week.
- Twenty one days are worked per month.

By copying the template, you can amend the working hours rules to those of your enterprise. You can also write a new working hours formula.

If you do copy or replace the predefined template you must name the new template `BIS_DAYS_TO_HOURS`.

See: *Writing or Editing a Formula, Oracle HRMS FastFormula User Guide*

Step 2: Set Up Training Hours *Required Step*

See: *Setting Up and Configuring Training Hours, page 3- 9*

Set Up Working Hours *Required Steps*

Step 3: Set Up Working Hours *Required Step*

To report on the number of regular and overtime hours worked by people in your workforce, you need to use Oracle FastFormula to provide information about how you record regular and overtime hours.

See: *Setting Up and Configuring Working Hours, page 3-11*

Step 4: Adapt Hours Worked Workbook *Required Step*

You need to create calculations in the Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook so it can report on your overtime bands.

See: *Adapting the Hours Worked Workbook, page 3-14*

Implement the Data Warehouse Module

This section contains the steps you need to perform in order to set up and configure the HRMSi Data Warehouse Module.

Set Up and Configure Workforce *Required Steps*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type. Calculations depend *either* on your budget measurement values for assignments, or they use a formula..

Step 1: Set budget measurement values *Optional Step*

Set budget measurement values for each employee assignment within Oracle Human Resources. Reports and performance measures then calculate workforce using the budget values.

If you do not set a budget measurement value for an assignment, and a Business Group default does not exist, the reports and performance measures either calculate workforce using a formula, or they will not include the workforce for an assignment.

Use the Assignment Budget Values window.

See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*

Step 2: Setup the WorkforceFormula Templates *Optional Step*

If you want to configure how workforce is counted do not set a budget measurement type and assignment measurement value for an assignment. The reports will then use a formula to calculate workforce.

HRMSi provides two predefined workforce formulas:

- TEMPLATE_HEAD
- TEMPLATE_FTE

Use the Formula window.

See: Configuring Workforce Calculations using Oracle FastFormula, page 3-39

Define Separation Categories *Required Steps*

You need to define separation reasons as voluntary or involuntary, so that the reports can count the number of employees leaving voluntarily or involuntarily.

Step 3: Define Separation Categories *Required Step*

You attribute your separation reasons to separation categories by copying and amending the HR_MOVE_TYPE_TEMPLATE formula. The concurrent program HRI Load Separation Reasons Table runs the formula. This process stores the results in a table to be used when you run a report.

See: Defining Separation Categories, page 3-40

Configure Dimensions *Optional Steps*

To implement the Data Warehouse module of HRMSi, you must configure the following dimensions:

Dimensions

- Age Band
- Period of Work
- Job (Job Category Sets)
- Person Type

Oracle advises you to perform configuration only once, prior to loading data into the warehouse. Attempts to reconfigure after you have run your initial concurrent programs may lead to errors in the data contained within the dimension.

Configuration is optional. However, you should be aware of the implications of not configuring dimensions. For information on standard configuration and the implications of not configuring dimensions, see: Standard Data Warehouse Configuration, page 3-20

Step 4: Configure the Age Band Dimension *Optional Step*

The Age Band dimension uses the following predefined values held within a table:

- 0 - 18 Years
- 18 Years - 26 Years
- 26 Years - 36 Years
- 36 Years - 46 Years
- 46 Years - 56 Years
- 56 Years - 66 Years
- 66 Years –

Each age band includes the lower limit, but excludes the upper limit, For example, someone aged exactly 18 is only included in the 18 Years - 26 Years band.

You can add and remove age bands using API calls. See: Configuring Age Bands, page 3-23

Step 5: Configure the Period of Work Dimension *Optional Step*

The Period of Work dimension uses the following predefined values held within a table:

- 0 - 3 months
- 3 - 6 months
- 6 - 9 months
- 9 months - 1 year
- 1 - 2 years
- 2 - 3 years
- 3 - 4 years
- 4 - 5 years
- 5 - 10 years
- 10 - 15 years
- 15 - 20 years

- 20 - 25 years
- 25 - 35 years
- 35 - 45 years
- 45 - 55 years
- 55 years -

Each period of work band includes the lower limit, but excludes the upper limit, For example, someone who has worked for exactly 1 year is included only in the 1 - 2 years band.

You can add and remove period of work bands using API calls. See: Configuring Period of Work Bands, page 3-24

Step 6: Configure the Job Dimension (Job Category Sets) *Optional Step*

When a job is defined, you can associate it with specific categories.

Job category sets are groups of job categories; they enable you to report on a job category set as opposed to individual job categories. For further information on job category sets, see: Job Category Sets, page 3-22

The Job dimension contains one predefined job category set. You can add or delete your own job category sets to the dimension.

See: Configuring Job Category Sets, page 3-25

Step 7: Configure the Person Type Dimension *Optional Step*

The Person Type dimension models the hierarchy based on the system and user person types on the Oracle HR transactional tables.

If you want to identify the person types on the warehouse, you need to map different categories of person type on the Oracle HR Transactional System to the desired person type on the warehouse.

See: Configuring Person Types, page 3-26

Populate Facts and Dimensions *Required Steps*

Step 8: Populate Facts and Dimensions *Required Step*

To populate the Facts and Dimensions you need to run collection and load programs.

See: Populating Facts and Dimensions, page 3-28

Define Data Warehouse Security *Required Steps*

The Embedded Data Warehouse (EDW) uses a different security model to the rest of Oracle Applications. Any security set up against a user or responsibility for transactional data will not reflect in the restrictions applied to the data warehouse.

Step 9: Define Data Warehouse Security *Required Step*

Use the Global Warehouse Administrator responsibility to define the dimension level values that a responsibility has access to. Against the dimension values you can give a valid list of values, for example, New York, Los Angeles. EDW does not apply any other security associated with a responsibility.

See: Configure Warehouse Security in the *Oracle Embedded Data Warehouse Implementation Guide* for more information about EDW Security and EDW Security setup.

Implement DBI for HRMS

Prior to installing Daily Business Intelligence for Human Resources, ensure that you have installed release 11i.8 or higher version of the Oracle Human Resources application before you implement Daily Business Intelligence for HR.

You also need to complete the implementation steps for core Daily Business Intelligence. See: *Daily Business Intelligence Implementation Guide* on Metalink.

You need to perform the following implementation steps to use Daily Business Intelligence for Human Resources.

Step 1: Enable the HR Management Page *Required Step*

Navigate to the Enable/Disable Pages window and select HR Management to enable this page.

See: Implementing Pages in *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Step 2: Set Up Users *Required Step*

Use the Users window to assign the Daily Business Intelligence for HRMS responsibility to each user who requires access to the page.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 3: Perform DBI Global Parameters Checks *Required Step*

Check that the DBI Global Parameters are correctly set up to meet your enterprise requirements.

Use the Global Parameters window.

See: Checking DBI Global Parameters, page 3-38

Step 4: Perform BIS Profile Checks *Required Step*

Check that the BIS profiles are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking BIS Profiles, page 3-39

Step 5: Configure Workforce Calculations *Required Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise reports and performance measures calculate workforce using a formula. If you configure the template formula for a business group, your configured version will override the template formula.

To configure workforce calculations, either:

- Set Budget Measurement Values

See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*

- Set Up the Workforce Formula

See: Configuring Workforce Calculations Using Oracle FastFormula, page 3-39

Step 6: Define Separation Categories *Optional Step*

DBI for HRMS provides a predefined formula, HR_MOVE_TYPE, that defines separation reasons as voluntary or involuntary. This definition enables DBI to report on the number of employees leaving your enterprise voluntarily or involuntarily.

The formula defines the leaving reasons Gross Misconduct and Deceased as Involuntary. It defines all other reasons as Voluntary.

Amend the HR_MOVE_TYPE formula if you want to change the way the formula attributes your separation reasons to the voluntary or involuntary separation categories.

See: Defining Separation Categories, page 3-40

Step 7: Ensure Formulas are Compiled *Required Step*

You need to verify that the following formulas are compiled:

- The TEMPLATE_HEAD formula, or its replacement if you have configured it
- The TEMPLATE_FTE formula, or its replacement if you have configured it.
- The HR_MOVE_TYPE_TEMPLATE, or its replacement if you have configured it.

Use the Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Step 8: Set Up the Job Hierarchy *Optional Step*

You can use links in the Salary report to drill down to reports that analyze salaries with job functions and families. For the drill reports to fully function, you need to set up Job Functions and Job Families.

Note: If you do not set up the Job Hierarchy, the drill reports will function, but they will group all jobs within an Unassigned Job Function and Family.

See: Setting Up the Job Hierarchy, page 3-42

Step 9: Enable the Payroll Events Model *Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to only records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you do not need to enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-45

Step 10: Populate the Time Dimension *Required Step*

If you have already not populated the Time dimension as part of implementing another intelligence product's request set, you must now populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-46

Step 11: Generate HR Management Page Request Sets *Required Step*

The HR Management page is based on data held in base summary tables and materialized views. You populate these structures using programs that are organized into request sets. You need to generate the request sets required by the page.

Use the Refresh Business Intelligence Data by Pages window.

See: Generating HR Management Page Request Sets, page 3-47

Step 12: Populate DBI Base Summary Tables *Required Step*

You need to run the HRI DBI Initial Load request set in order to populate the underlying tables. After successfully running the HRI DBI Initial Load request set you can incrementally collect data by running the HRI DBI Incremental Refresh request set.

Use the Submit Requests window.

See: Populating DBI Summary Data Structures, page 3-48

Technical Essays

Daily Business Intelligence Technical Essays

Materialized Views

In DBI for HR the summary layer is built using materialized view technology. The BIS Materialized View Refresh Program refreshes the following materialized views after populating the base summaries during initial and incremental loads.

Materialized View Name	Description
HRI_DBI_COUNT_IL1_MV	Used internally by DBI for HRMS to support headcount aggregates.
HRI_DBI_COUNT_IL2_MV	Used internally by DBI for HRMS to support headcount aggregates.
HRI_DBI_GRAPH_SEQ_MV	Used internally by DBI for HRMS to support trend reports.
HRI_DBI_SALARY_IL1_MV	Used internally by DBI for HRMS to support Salary aggregates.
HRI_DBI_SALARY_IL2_MV	Used internally by DBI for HRMS to support Salary aggregates.
HRI_DBI_WMV_BUDGET_MV	Holds budgeted headcount data by manager.
HRI_DBI_WMV_CHANGES_MV	Holds headcount data by manager for new hires, terminations and transfers.
HRI_DBI_WMV_CTR_MV	Holds headcount data by country and manager.
HRI_DBI_SAL_CTR_MV	Holds salary data by currency, country, and manager.
HRI_DBI_SALARY_MV	Holds salary data by currency and manager.
HRI_DBI_WMV_COUNT_MV	Holds headcount data by manager.
HRI_DBI_WMV_SUPJOB_MV	Holds headcount data by job function, job family, and manager.
HRI_DBI_SAL_SUPJOB_MV	Holds salary data by currency, job function, job family, and manager.

Data Warehouse Module Technical Essays

Example Configuration Script

The following script configures all of the dimensions as an example. For later reference, Oracle recommends that you save all the API calls you wish to make as a SQL file, and then run this file from a SQL*Plus session on the APPS schema.

```
WHenever OSerror exit failure rollback;
Whenever SQLerror exit failure rollback;
REM
REM Description:
REM This script configures the HRI dimensions
REM Age Band
REM Service Band
REM Job
REM Person Type
REM It also enables all separation reasons to be re-categorized
```

```

REM =====
=====
REM
BEGIN
/*****/
/* Age Band Dimension */
/*****/
/* Split age band 0 - 18 years */
/* into 0 - 16 years and 16 - 18 years */
hri_edw_dim_age_band.insert_age_band
(16,0);
/*****/
/* Service Band Dimension */
/*****/
/* Remove the service bands 3 - 6 months, 6 - 9 months */
/* and 9 months - 1 year, and leave the first service band as 0 -
1 year */
hri_edw_dim_service.remove_service_band
(0,3,0,0);
hri_edw_dim_service.remove_service_band
(0,6,0,0);
hri_edw_dim_service.remove_service_band
(0,9,0,0);
/*****/
/* Job Dimension */
/*****/
/* Add another job category set for General Administration (GA) */
/* A lookup code of NOT_ADM should be added through forms */
/* with a meaning of "Not General Administration" */
hri_edw_dim_job.add_job_category
(2,null,'NOT_ADM');
hri_edw_dim_job.add_job_category
(2,'GA',null);
/*****/
/* Person Type Mappings */
/*****/
/* Map an employee with a user person type of "Consultancy" to Con
sultant */
hri_edw_dim_person_type.insert_user_row
('EMP', 'Consultancy', 'CONSULTANT');
/*****/
/* Workforce Separation Fact */
/*****/
/* Enable all separation reason categorizations to be overwritten
*/
hri_edw_fct_wrkfc_sprtn_set_update_flag
(null,'Y');
END;
/
Commit;

```

Deploy Strategic Reporting

Deploy Strategic Reporting

Programs to Populate HRMSi Strategic Reports

The HRMSi strategic reports rely on collected data, stored in summary tables, in order to run efficiently. You need to collect data from your transaction tables regularly so that the information in your reports is up to date. You collect the data by running the following pre-defined concurrent programs:

- HRI Load All Competence Level Hierarchy, page 3- 2
- HRI Load All Competence Requirement Fact, page 3- 3
- Update Gregorian Hierarchy in the Time Dimension, page 3- 3
- HRI Load All Geography Category Structures, page 3- 4
- HRI Load Separation Reasons Table, page 3- 5

For information on concurrent programs, see: *Overview of Concurrent Processing, Oracle Applications Developer's Guide*

HRI Load All Competence Level Hierarchy

All Analytics business areas and workbooks that use the competence level hierarchy gather information from the Competence Level Summary table. Use the HRI Load All Competence Level Hierarchy concurrent program to populate this summary table with your competence level hierarchy data.

The program collects pre-calculated data and stores it in the Competence Level Summary (HRI_CS_CMPTNC_LVL_CT) table ready for use by the workbooks.

Parameters

The HRI Load All Competence Level Hierarchy concurrent program uses the following parameters:

- **Collect From Date**
The earliest date required for competence level hierarchy information. The default is five years previous the first time you run this program, thereafter the value defaults to the previous Collect To Date.

- **Collect To Date**
The latest date required for competence level hierarchy information. The default is the current date.

- **Full Refresh**
If you set Full Refresh to Yes, the concurrent program deletes all information previously held in the summary table, and recalculates the competence level hierarchy for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).
If you set Full Refresh to No, the concurrent program deletes none of the existing table information. The concurrent program incrementally updates the summary table with any competence level hierarchy changes that occurred within the collection date range specified (see the Collect From Date and Collect To Date parameters).

Run Frequency

Run this concurrent program infrequently in full refresh mode, and frequently in incremental mode (Full Refresh = No) to capture and report on competence level hierarchy changes in your enterprise.

If a system failure occurs, you must restart the process.

HRI Load All Competence Requirement Fact

All Analytics business areas and workbooks that use the job competence requirements gather information from the Competence Requirement Fact Summary table. Use the HRI Load All Competence Requirement Fact concurrent program to populate this summary table with your job competence requirement data.

The program collects pre-calculated data and stores it in the Competence Requirement Fact Summary (HRI_MB_CMPTNC_RQRMNT_CT) table ready for use by the workbooks.

Parameters

The HRI Load All Competence Requirement Fact concurrent program uses the following parameters:

- **Collect From Date**

The earliest date required for competence requirement information. The default is five years previous the first time you run this program, thereafter the value defaults to the previous Collect To Date.

- **Collect To Date**

The latest date required for competence requirement information. The default is the current date.

- **Full Refresh**

If you set Full Refresh to Yes, the concurrent program deletes all information previously held in the summary table, and collects competence fact information for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).

If you set Full Refresh to No, the concurrent program deletes none of the existing table information. The concurrent program incrementally updates the summary table with any competence fact changes that occurred within the collection date range specified (see the Collect From Date and Collect To Date parameters).

Run Frequency

Run this concurrent program infrequently in full refresh mode, and frequently in incremental mode (Full Refresh = No) to capture and report on competence level hierarchy changes in your enterprise.

If a system failure occurs, you must restart the process.

Update Gregorian Hierarchy in the Time Dimension

This program populates the time dimension folders in the Developer HRMSi – Administration – Analytic Dimensions business area with time information. So, for

example, it populates the Time Year – (Dimension Level) folder with a list of years, and the Time Month – (Dimension Level) folder with a list of months.

Parameters

Update Gregorian Hierarchy in the Time Dimension concurrent program has the following parameters:

- **Date From**
Set this to the earliest date you need to see in your reports.
- **Date To**
Set this to the latest date you need to see in your reports.

Do not use an unnecessarily wide date range, as this will impede performance.

Run Frequency

Run this program when you need to collect future dates.

HRI Load All Geography Category Structures

Run the HRI Load All Geography Category Structures concurrent program in order to populate the geography dimension with values. This concurrent program populates the location information stored in the HR_LOCATIONS_ALL table into a separate summary table.

Parameters

The HRI Load All Geography Category Structures concurrent program has the following parameters:

- **Collect From Date**
The earliest date required for geography information. The default is one month previous the first time you run this program, thereafter the value defaults to the previous Collect To Date.
- **Collect To Date**
The latest date required for geography information. The default is the current date.
- **Full Refresh**
If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the dimension again for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).
If you set Full Refresh to No, the program collects data in the incremental mode and that means it inserts new records without purging the table.

Run Frequency

Oracle recommends that you run the HRI Load All Geography Category Structures concurrent program infrequently in full refresh mode, and frequently in incremental mode to reflect changes in the geography hierarchy in your enterprise.

If a system failure occurs, you must restart the process.

HRI Load Separation Reasons Table

This concurrent program collects formula definitions for voluntary and involuntary separation reasons into a table to improve reporting performance.

Parameters

This concurrent program has no parameters.

Run Frequency

At implementation you need to run the HRI Load Separation Reasons Table concurrent program in order to initially populate the Separation Reasons table.

Thereafter, Oracle recommends that you run the HRI Load Separation Reasons Table concurrent program only after changes to the HR_MOVE_TYPE formula.

Note: If you have EDW implemented then it is recommended that you never schedule the HRI Load Separation Reasons Table process to run regularly. It should only be run on an ad-hoc basis when the full implications on the Workforce Separation fact re-collection are understood and accepted.

Deploy Discoverer Analytics

Deploy Discoverer Analytics Overview

Use the procedures in this topic in conjunction with the implementation steps to successfully set up the Discoverer Analytic workbooks.

Setting Up Geography

The geography dimension reflects a hierarchical location on Earth. A geography dimension may define an area as large as a world region or as small as a grid location on a building floor, or a stock location.

You need to define three levels of geography dimension:

- Area (parent of country)
 - Country (parent of region)
 - Region
1. You first need to define your areas, countries, and regions for the geography dimension.
See: Defining areas, countries, and regions, page 3- 6
 2. Once you have defined your areas, countries, and regions, you need to assign the regions to countries, and the countries to areas.
See: Assigning areas, countries, and regions, page 3- 7
 3. Create a Region segment on the Location Descriptive Flexfield.
See: Setting up a Region segment, page 3- 7
 4. Enter a region in the Region segment.
See: Assigning a Region to a location, page 3- 8
 5. Map the region flexfield segment to the geography dimension.
See: Mapping the Region flexfield segment to the geography dimension, page 3- 8
 6. Finally, populate the geography dimension with values.
See: Populating the Geography Dimension, page 3-17

Defining Areas, Countries, and Regions

Areas are unique groups with countries assigned. You can define areas as you wish. Areas are not predefined—you must create the areas that you need.

Country is an existing dimension and is already defined in Oracle Applications.

Regions are subsets of countries. You can define as many regions as you wish within a country. Regions are not predefined—you must create the regions that you need.

Use the Application Object Library Lookups window.

To define areas:

1. Enter Query Mode and search for Area in the Type field.

2. Add desired areas (for example, North America, EMEA, or Asiapac)
3. Save your changes.

To define regions:

1. Enter Query Mode and search for Region in the Type field.
2. Add desired areas (for example, North, South, East, West, or My Region)
3. Save your changes.

Assigning Areas, Countries, and Regions

Once you have defined your areas and regions, you need to assign regions to countries, and countries to areas.

Use the Define Territory Hierarchies window.

To assign regions to countries:

1. In the Parent Territory Type field, select Country.
2. In the Code field, select a country that you have created.
3. In the Child Territory region, select the regions you want to associate with the selected country.
4. Repeat for other countries as necessary.
5. Save your changes.

To assign countries to areas:

1. In the Parent Territory Type field, select Area.
2. In the Code field, select an area that you have created.
3. In the Child Territory region, select the countries you want to associate with the selected area.
4. Repeat for other areas as necessary.
5. Save your changes.

Setting Up a Region Segment

Set up a Region segment on the Location descriptive flexfield.

Use the Descriptive Flexfield Segments window.

To set up a Region segment:

1. In the Title field, query for Additional Location Details.
2. Unfreeze the flexfield.
3. In the Context Field Values region, select Global Data Elements.
4. Click the Segments button.
5. Enter a new region segment name.
6. Select an available attribute.

7. In the Value Set field, enter BIS Region Value Set (predefined).
8. Freeze the flexfield.
9. Compile the flexfield.

Assigning a Region to a Location

Once you have defined regions and set up the region segment on the Location flexfield, you need to associate regions with locations.

Use the Location window.

To assign a region to a location:

1. In the Name field, query for the desired location.
2. Click on the flexfield.
3. In the Region field of the Additional Location Details window, enter the name of a region you defined earlier.
4. Exit the flexfield.
5. Save your changes.
6. Repeat for other locations as necessary.

Mapping the Region Flexfield Segment to the Geography Dimension

You need to map your Region flexfield segment (see: Setting up a Region segment, page 3-7) to the Geography dimension.

Use the Flexfield Mappings window.

To map the region flexfield segment to the geography dimension:

1. In the Flexfield Name field, query Additional Location Details.
2. In the Dimension region, enter a dimension of Geography with a level of Region.
3. Save your changes
4. Click the Segment Mapping button.
5. In the Context Code field, enter Global Data Elements.
6. In the End User Column Name field, select the name of your region segment.
7. Close the Segment Mappings window.
8. Save your changes and close the Flexfield Mappings window.

What's Next

Once you have performed this procedure, you can populate the Geography dimension. See: Populating the Geography Dimension, page 3-17

Setting Up and Configuring Training Hours

The number of training hours for your employees is displayed in the Training Success report and in the following workbooks:

- Student Training Success (External Students) Analysis Workbook
- Student Training Success (Internal Students) Analysis Workbook
- Training Cost and Revenue Analysis Workbook
- Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook
- Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook

The number of training hours is also displayed in the following KPI reports:

- Training Attendance Status
- Training Attendance with Job Category Status

Within Oracle Learning Management you can record the duration of a training event using a time period of your choice. For example, rather than recording an event in hours you might record it in weeks or months.

See: *Creating Event Sessions, Oracle Learning Management User Guide* and *Create a One-Time Event, Oracle Learning Management User Guide*

To enable the reports to display the number of hours of an event, a predefined formula, `TEMPLATE_BIS_TRAINING_CONVERT_DURATION`, converts your time periods into hours.

OTA is installed with four predefined time periods. If you record the duration of events using these predefined time periods the formula automatically converts them into the following hours:

- D (Day) = 8 Hours
- W (Week) = 40 Hours
- M (Month) = 169 Hours
- Y (Year) = 2028 Hours

Note: You set up time periods in Oracle Training Administration using the Lookup type `FREQUENCY`.

However, you should copy and amend the formula if:

- The number of hours per time period does not match those of your enterprise.
- You have set up different time periods using the Lookup type `FREQUENCY`.

Additional frequencies you have set up are not automatically converted to hours using the predefined formula.

1. Amending the Default Hours

To ensure that the report and workbooks calculate the correct hours for your training events you can configure the predefined formula.

See: *Amending Default Training Hours*, page 3-10

2. Adding Additional Training Time Periods

If you have defined your own training time periods using the FREQUENCY Lookup you must copy and amend the predefined formula. If you do not add your additional time periods to the formula the hours for these events will not be included in the report and workbooks.

See: Adding Additional Training Time Periods, page 3-10

Amending Default Training Hours

To ensure that the report and workbooks calculate the correct hours for your training events you can configure the predefined TEMPLATE_BIS_TRAINING_CONVERT_DURATION formula.

For example, if you record the duration of a training event in days, and within your training organization a day is 10 hours, use the Formula window to:

1. Copy the predefined template formula TEMPLATE_BIS_TRAINING_CONVERT_DURATION.

You must name the new formula BIS_TRAINING_CONVERT_DURATION, otherwise the report and workbooks cannot use it.

2. Replace the number of hours a training event runs in a day.

In the predefined formula the number of hours are set as follows:

```
hours_per_day = 8
```

Replace the number of hours with 10:

```
hours_per_day = 10
```

3. Compile the new formula.

For information on editing a formula, see: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Adding Additional Training Time Periods

If you have defined your own training time periods using the FREQUENCY Lookup you must copy and amend the predefined TEMPLATE_BIS_TRAINING_CONVERT_DURATION formula. If you do not add your additional time periods to the formula the hours for these events will not be included in the report and workbooks.

For example, if you set up a time period called Fortnight using the Lookup code of F (Fortnight), use the Formula window to amend the formula as follows:

1. Copy the predefined template formula TEMPLATE_BIS_TRAINING_CONVERT_DURATION.

You must name the new formula BIS_TRAINING_CONVERT_DURATION, otherwise the report and workbooks cannot use it.

2. Add the additional text shown in bold to set up the formula so that it converts fortnight into hours:

```

/* Main Body of Formula */
hours_per_day = 8
hours_per_week = hours_per_day * 5
hours_per_fortnight = hours_per_week * 2
hours_per_month = hours_per_week * 4.225
hours_per_year = hours_per_month * 12

/* Calculate Duration in Hours */
IF (from_duration_units = 'Y') THEN
  hours = from_duration * hours_per_year
ELSE IF (from_duration_units = 'M') THEN
  hours = from_duration * hours_per_month
ELSE IF (from_duration_units = 'F') THEN
  hours = from_duration * hours_per_fortnight
ELSE IF (from_duration_units = 'W') THEN
  hours = from_duration * hours_per_week
ELSE IF (from_duration_units = 'D') THEN
  hours = from_duration * hours_per_day
ELSE IF (from_duration_units = 'H') THEN
  hours = from_duration
ELSE
  hours = 0
/* Calculate Duration in desired units */
IF (to_duration_units = 'H') THEN
  to_duration = hours
ELSE IF (to_duration_units = 'D') THEN
  to_duration = hours / hours_per_day
ELSE IF (to_duration_units = 'W') THEN
  to_duration = hours / hours_per_week
ELSE IF (to_duration_units = 'F') THEN
  to_duration = hours / hours_per_fortnight
ELSE IF (to_duration_units = 'M') THEN
  to_duration = hours / hours_per_month
ELSE IF (to_duration_units = 'Y') THEN
  to_duration = hours / hours_per_year
ELSE
  to_duration = 0
RETURN to_duration

```

3. Compile the formula.

For more information on editing a formula, see: *Writing or Editing a Formula, Oracle HRMS FastFormula User Guide*

Setting Up and Configuring Working Hours

The Hours Worked report, and the Employee Hours Worked Trend Analytics Workbook, enable you to investigate the number of regular hours and overtime hours worked by employees in your enterprise.

Within Oracle Human Resources you use elements to record the number of regular and overtime hours worked. You can set up different elements to represent overtime bands and regular hours. This gives you the freedom to record and pay employees exactly how you want.

To use the Hours Worked report or workbook, you need to set up information about how you are recording regular and overtime hours. To do this you use Oracle

FastFormula. You first need to create database items for the input values of the elements that record regular and overtime hours.

1. **Create Database Items**

Create a database items for the input values of the elements that record regular hours and overtime hours.

See: *Creating Database Items for Working Hours Input Values*, page 3-14

2. **Regular Hours Formula**

You first need to create a formula to calculate the regular hours recorded for your employees.

You must name the regular hours formula BIS_REG_HOURS. This is the formula that the Hours Worked reports look for when calculating the regular hours.

The formula type must be QuickPaint.

Set up your formula as follows to display regular hours on the Hours Worked reports:

```
default for <element name>_<input name>_entry_value is 0.00
hours_worked =
<element name>_<input name>_entry_value
Return hours_worked
```

In the above code <element name>_<input name>_entry_value represents the database item you created for the input value of the element that records regular hours. Replace the following:

- **<element name>**: Replace with the name of the element you are using to record regular hours worked.
- **<input name>**: Replace with the name of the input value on the element you are using to record regular hours worked.

See: *Writing or Editing a Formula, Oracle HRMS FastFormula User Guide*

3. **Overtime Band formula**

Most enterprises have more than one overtime band set up. For example, you may have an overtime band for double time, time and a half, triple time and so on.

You need to create a formula for each overtime band you use. You must name your formulas:

- BIS_OT_BAND1
- BIS_OT_BAND2
- BIS_OT_BAND3
- ... and so on.

The number at the end of the formula name should change with each overtime band.

Set up the formula type as QuickPaint.

You can set up the elements that record overtime in different ways:

- A single element with input for each overtime band
- Multiple elements, one for each overtime band

Whichever method you use, you need to set up one formula for each overtime band. Base your formulas on the following code:

```
default for <element name>_<input name>_entry_value is 0.00
hours_worked = to_number(<element name>_<input name>_entry_value)
return hours_worked
```

In the above code <element name>_<input name>_entry_value represents the database items you created for the input value of each element that record overtime hours. Replace the following:

- **<element name>**: Replace with the name of the element you are using to record overtime hours worked.
- **<input name>**: Replace with the name of the input value on the element you are using to record overtime hours worked.

The Hours Worked report shows up to 10 overtime bands, therefore, for this report, you can write up to 10 formulas. The Employee Hours Worked Trend Analytics Workbook displays one overtime band as default, but you can customize this workbook to display however many overtime bands you use in your enterprise.

The Hours Worked report uses the description you enter in the Description field of the Oracle Human Resources Formula window to label each overtime bar on the chart. It only uses the first 20 characters of the description.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

4. Overtime Band Formulas in the United States

If you are using Oracle Human Resources in the United States and you use the predefined Overtime element to record information about overtime, writing the formula is simple. Oracle Human Resources provides a predefined example of the formula you need to write. The example formula is called EXAMPLE_BIS_OT_BAND1 and you can view it using the Formula window.

The sample formula is shown below:

```
/* *****
FORMULA NAME: EXAMPLE_BIS_OT_BAND1
FORMULA TYPE: Quickpaint
DESCRIPTION: This is an example of the syntax required for the
              formula you need to set up for use with
              the Hours Worked Report. The function
              get_hours_worked calculates total hours worked from
              the Overtime element predefined with US Payroll.
INPUTS: None
DBI Required: None
Change History
10 Sep 98 jmay Created
***** */
/* Defaults Section */
/* Inputs Section */
/* Main Body of Formula */
hours_worked = get_hours_worked(1.5)
RETURN hours_worked
```

Note: This example only works if you use the predefined US Overtime element.

For each overtime band your enterprise uses, set up a formula based on the example. You must name your formulas:

- BIS_OT_BAND1
- BIS_OT_BAND2
- BIS_OT_BAND3
- ... and so on.

The number at the end of the formula name should change with each overtime band.

Creating Database Items for Working Hours Input Values

Prior to amending the formula for configuring working hours, you need to create database items for the input values on the elements you use to record regular and overtime hours.

Use the Element window.

To create database items for working hours input values:

1. In the Name field, search for the name of the element used to record regular or overtime hours.
2. Click Input Values to go to the Input Values window.
3. Select Database Item to create a database item for the input value.

Repeat the above steps for each element you use to record hours.

Adapting the Hours Worked Workbook

The Employee Hours Worked Trend Analytics Workbook contains a calculation named Example Overtime Band 1. To display all the overtime bands used by your enterprise, you need to create new calculations for each overtime band. Use the predefined Example Overtime Band 1 calculation as your template.

The calculation text in Example Overtime Band 1 is:

```
SUM(HRI_UTL_GET_HOURS_WORKED('EXAMPLE_BIS_OT_BAND1',"Assignment I  
d (for Workbook Calculation)",NULL,Period End Date))
```

Use Oracle Discoverer User Edition.

To adapt the Hours Worked Workbook:

1. In Oracle Discoverer User Edition, open the HRMSi - Employee Hours Worked (Organization Hierarchy) Trend Analytics workbook.
2. Copy and rename the example calculation Example Overtime Band 1 for each overtime band you want to display in the report.
3. In the text of each new calculation, change EXAMPLE_BIS_OT_BAND1 to the name of each of one of your overtime band formulas.

Note: If you have not created Overtime Band formulas, see: Setting Up and Configuring Working Hours, page 3-11

4. Hide the example calculation.

Populating the Competence Level Hierarchy

Reports that use the competence level hierarchy gather information from the Competence Level Summary table.

Populate this summary table with your competence level hierarchy data. Use the HRI Load All Competence Level Hierarchy concurrent program. The program will collect pre-calculated data and store it in the Competence Level Summary table ready for use by the workbooks.

Use the Submit Requests window.

To populate the Competence Level Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Competence Level Hierarchy.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Collect From Date	The earliest date required for competence level hierarchy information (default is five years previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default)

4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Competence Level Hierarchy, page 3- 2

Populating Job Competence Requirements

Reports that use the job competence requirements gather information from the Competence Requirement Fact Summary table.

You must populate this summary table with the job competence requirements used by your reports. Use the HRI Load All Competence Requirement Fact concurrent program. The program will collect pre-calculated data and store it in the Competence Requirement Fact Summary table ready for use by the workbooks.

Use the Submit Requests window.

To populate the Competence Requirement Fact Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Competence Requirement Fact.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Collect From Date	The earliest date required for competence requirement information (default is five years previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default)

4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Competence Requirement Fact, page 3- 3

Populating the Time Dimension for Analytics

Analytics workbooks use time elements such as Year, Month, and Week. The workbooks will not return any data unless you populate the Discoverer End User Layer time dimension folders with time elements by using the Update Gregorian Hierarchy in the Time Dimension concurrent program.

The Update Gregorian Hierarchy in the Time Dimension concurrent program populates the Time dimension folders in the Developer HRMSi – Administration – Analytic Dimensions business area with time information. So, for example, it populates the Time Year – (Dimension Level) folder with a list of years, and the Time Month – (Dimension Level) folder with a list of months.

Use the Submit Requests window.

To populate the Time Dimension folders:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Update Gregorian Hierarchy in the Time Dimension.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Date From	The earliest date you need to see in your reports
Date To	The latest date you need to see in your reports

4. Submit your request.

What's Next

Run this program when required to collect dates further in the future. For full information on this concurrent program, see: Update Gregorian Hierarchy in the Time Dimension, page 3- 3

Restrictions

Do not use an unnecessarily wide date range, as this will impede performance.

Populating the Geography Dimension

Prior to populating the geography dimension, you must set up the geography structures. See: Setting Up Geography, page 3- 6

Run the HRI Load All Geography Category Structures concurrent program to populate the geography dimension with values. This concurrent program populates the location information stored in the HR_LOCATIONS_ALL table into a separate summary table.

Use the Submit Requests window.

To populate the geography dimension:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Geography Category Structures.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Collect From Date	The earliest date required for geography information (default is one month previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default is No)

4. Submit your request.

What's Next

Run this program when required to collect dates further in the future. For full information on this concurrent program, see: HRI Load All Geography Category Structures, page 3- 4

Deploy the Data Warehouse Module

Deploy the Data Warehouse Module

Use the procedures in this topic in conjunction with the implementation steps to successfully set up the data warehouse module workbooks.

Programs to Populate the Data Warehouse Module

The HRMSi data warehouse module is based on collected data held in Embedded Data Warehouse (EDW) facts and dimensions. To populate the facts and dimensions you need to run collection and load programs.

Collection programs are concurrent programs that extract fact and dimension information from the HRMS source system into the interface tables on the warehouse. Load programs are concurrent programs that move fact and dimension information from the interface tables to the warehouse fact and dimension tables, respectively.

Run the fact and dimension collection programs on each source system that you want to collect data from.

Run the collection programs before you run the load programs to avoid dangling records. You should also collect dimensions before you collect facts, and load dimensions before you load facts.

Collection Programs

Run the following collect processes on the source system using the Site Warehouse Administrator Responsibility:

Collection Programs for Dimensions

- Collect Age Band Dimension
- Collect Assignment Change Dimension
- Collect Assignment Dimension
- Collect Grade (Human Resources) Dimension
- Collect Job Dimension
- Collect Movement Type Dimension
- Collect Organization Dimension
- Collect Period of Work Dimension
- Collect Person Dimension
- Collect Person Type Dimension
- Collect Position Dimension
- Collect Reason Dimension
- Collect Recruitment Activity Dimension
- Collect Requisition Vacancy Dimension
- Collect Sales Resource Dimension

- Collect Service Band Dimension
- Collect Geography Dimension
- Collect Time Dimension

Collection Programs for Facts

- Collect Workforce Activity Fact
- Collect Workforce Composition Fact
- Collect Workforce Recruitment Stage Fact
- Collect Workforce Separation Fact

Load Programs

You should run the following load processes on the target system using the Global Warehouse Administrator Responsibility:

Load Programs for Dimensions

- Load Age Band Dimension
- Load Assignment Change Dimension
- Load Assignment Dimension
- Load Grade (Human Resources) Dimension
- Load Job Dimension
- Load Movement Type Dimension
- Load Organization Dimension
- Load Period of Work Dimension
- Load Person Dimension
- Load Person Type Dimension
- Load Position Dimension
- Load Reason Dimension
- Load Recruitment Activity Dimension
- Load Requisition Vacancy Dimension
- Load Sales Resource Dimension
- Load Geography Dimension
- Load Time Dimension

Load Programs for Facts

- Load Workforce Activity Fact
- Load Workforce Composition Fact
- Load Workforce Recruitment Stage Fact
- Load Workforce Separation Fact

Run Frequency

Run the collection and load programs regularly to maintain the timeliness of the fact and dimension data.

However, be aware that if you have erroneously entered data in the HRMS database, then deleted it, and you have run a collection program in the meantime, the program will collect the erroneous data into the data warehouse. Given the size of the system, some erroneous data will be immaterial to the overall results in the reports.

If you want to avoid deleted records being incorrectly retained in facts, you should purge and re-collect the entire fact. When collecting the data for dimensions, if you set the End Date parameter to, say, a week prior to the collection date, you will lessen the chance of collecting erroneous table entries.

Standard Data Warehouse Configuration

The data warehouse module makes use of some predefined data, and some settings you already have in place. Therefore, configuration is optional. However, if you do not configure the fact and dimensions, or you choose to configure after you have collected data, you should be aware of the following:

Implications of not configuring dimensions and facts

- **Age Band and Period of Work**

Age Band and Period of Work dimensions have predefined bands; these are described in more detail below. If you do not configure these dimensions, the collection process will use the seeded bands to collect data into the warehouse. If you configure these dimensions after you have collected data, the collection process brings the new bands into the warehouse, but does not remove old bands; this may cause confusion and you must re-collect any facts in order to point to the newly configured bands.

- **Job Category Sets**

You can add or remove Job Categories at any time, and when you run the collection process it will update the Job dimension with the changes. If you do not initially configure this dimension, the collection process collects all jobs with the predefined job category set only. If you configure the dimension at a later date, this does not impact on other data and you must re-collect facts. Data already collected may be inaccurate; to rectify this you need to re-collect the dimension.

The predefined job category set is described in more detail below.

- **Person Type Mappings**

HRMSi does not predefine data for this dimension. If you do not initially configure this dimension, the collection process collects person types as they are on the system. If you later need to map additional person types, the collection process adds these changes to the warehouse, but does not remove mappings; this could lead to confusion and you must re-collect any facts in order to use the new person types.

- **Workforce Separation**

HRMSi uses a formula to predefines some separation reasons in the warehouse as voluntary or involuntary. You can add separation reasons to the formula easily, and when you next run the collection program it will update the warehouse with your changes. If you do not configure the separation reasons, the warehouse uses the seeded values.

If you need to re-categorize a reason (for example, it was first collected as Voluntary but needs changing to Involuntary) you must re-collect the fact to pick up the change. To avoid this happening inadvertently, HRMSi stores and protects all reasons categorized by the formula; you need to call an API in order to allow a change through to the warehouse. See Updating Reasons below for more details.

Predefined data

The data warehouse module uses the following predefined data:

Age Bands

The Age dimension uses the following predefined values held within a table:

- 0 - 18 Years
- 18 Years - 26 Years
- 26 Years - 36 Years
- 36 Years - 46 Years
- 46 Years - 56 Years
- 56 Years - 66 Years
- 66 Years –

Each age band includes the lower limit, but excludes the upper limit, For example, someone aged exactly 18 is only included in the 18 Years - 26 Years band.

Period of Work Bands

The Period of Work dimension uses the following predefined values held within a table:

- 0 - 3 months
- 3 - 6 months
- 6 - 9 months
- 9 months - 1 year
- 1 - 2 years
- 2 - 3 years
- 3 - 4 years
- 4 - 5 years
- 5 - 10 years
- 10 - 15 years
- 15 - 20 years
- 20 - 25 years
- 25 - 35 years
- 35 - 45 years
- 45 - 55 years
- 55 years -

Each period of work band includes the lower limit, but excludes the upper limit. For example, someone who has worked for exactly 1 year is included only in the 1 - 2 years band.

Job Category Sets

The Job dimension contains one predefined job category set, with the following settings:

Job Category Set Number	Job Categories in Set	Value returned if job is outside the set
1	Revenue Generating Support	Not Revenue Generating or Support

Job Category Sets

When a job is defined, you can associate it with specific categories. For example, you could link the job Sales Clerk to the job categories Revenue Generating and General Administration, and you could link the job Support Engineer to the job categories Support and Technical, and you could link the job Secretary to the job categories General Administration and Secretarial.

Job category sets are groups of job categories; they enable you to report on a job category set as opposed to individual job categories.

The Job Dimension in the data warehouse has up to 15 columns corresponding to job category sets. If a job is associated with a job category that belongs to a job category set, the corresponding job category set column displays the job category. If a job is associated with none of the job categories in the job category set, the job category column displays the value you define as the opposite of the job category set.

For example, if you group the job categories Revenue Generating and Support into Job Category Set 1, and define the opposite of the job category set as Not Revenue Generating and Support, the Job Category Set 1 column will return values, as shown in the following table:

Jobs and Associated Job Category Sets

Job	Job Category Set 1
Sales Clerk	Revenue Generating
Support Engineer	Support
Secretary	Not Revenue Generating or Support

If you add another job category set, for example, Job Category Set 2, with the job categories General Administration and Secretarial, and you define the opposite of the job category set as Not Administration, the Job dimension would represent the data as follows:

Jobs and Associated Job Category Sets

Job	Job Category Set 1	Job Category Set 2
Sales Clerk	Revenue Generating	General Administration
Support Engineer	Support	Not Administration
Secretary	Not Revenue Generating or Support	Secretarial

Job Category Sets work best when no job has more than one associated Job category from any given job category set. If a job is associated with more than one job category in a single job category set, the job category displayed is arbitrary.

See: Configuring Job Category Sets, page 3-25

Configuring Age Bands

The Age Band dimension uses a set of predefined age bands that you can configure to suit your system requirements.

Caution: If you do need to configure the age bands, Oracle recommends that you do so before you initially load data into the data warehouse. See: Standard Data Warehouse Configuration, page 3-20

To Add Age Bands:

1. Use the following API call:

```
HRI_EDW_DIM_AGE_BAND.INSERT_AGE_BAND(age_min_years, age_min_months)
```

Use the age_min_years and age_min_months parameters to specify the starting value of your new age band in months and years. You must enter a value for each parameter.

For example, to specify a new age band starting at 1 year you would enter the API call as follows:

```
HRI_EDW_DIM_AGE_BAND.INSERT_AGE_BAND(1,0)
```

Alternatively, you could specify the start of the age band as 0 years and 12 months as follows:

```
HRI_EDW_DIM_AGE_BAND.INSERT_AGE_BAND(0,12)
```

For an example of how to configure Age Bands, see Example Configuration Script, page 2-14

To Remove Age Bands:

1. Use the following API call:

```
HRI_EDW_DIM_AGE_BAND.REMOVE_AGE_BAND(age_min_years, age_min_months)
```

Use the age_min_years and age_min_months parameters to specify the starting value of the age band you wish to remove, in months and years. You must enter a value for each parameter.

For example, the following calls will both remove the age band starting at 1 year:

```
HRI_EDW_DIM_AGE_BAND.REMOVE_AGE_BAND(1,0)
HRI_EDW_DIM_AGE_BAND.REMOVE_AGE_BAND(0,12)
```

For an example of how to configure Age Bands, see Example Configuration Script, page 2-14

Configuring Period of Work Bands

The Period of Work dimension uses a set of predefined period of work bands that you can configure to suit your system requirements.

Caution: If you do need to configure the period of work bands, Oracle recommends that you do so before you initially load data into the data warehouse. See: Standard Data Warehouse Configuration, page 3-20

To add Period of Work Bands:

1. Use the following API call:

```
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND (service_min_years,service_min_months,service_min_weeks,service_min_days)
```

The API parameters, `service_min_years`, `service_min_months`, `service_min_weeks`, and `service_min_days`, allow you to specify the starting value of a new period of work band in years, months, weeks and days, respectively. You can use any combination of these parameters. You must enter a value for each parameter.

For example, to add a period of work band starting at 60 years, you could use any of the following API calls:

```
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND(60,0,0,0)
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND(59,12,0,0)
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND(0,720,0,0)
```

For an example of how to configure Period of Work Bands, see Example Configuration Script, page 2-14

To remove Period of Work Bands:

1. Use the following API call:

```
HRI_EDW_DIM_SERVICE_BAND.REMOVE_SERVICE_BAND (service_min_years,service_min_months,service_min_weeks,service_min_days)
```

The API parameters, `service_min_years`, `service_min_months`, `service_min_weeks`, and `service_min_days`, allow you to specify the starting value of the period of work band you wish to remove in years, months, weeks and days respectively. You can use any combination of these parameters. You must enter a value for each parameter.

For example, to remove the period of work band starting at 60 years that was added in the previous example, you could use any of the following API calls:

```
HRI_EDW_DIM_SERVICE.REMOVE_SERVICE_BAND(60,0,0,0)
HRI_EDW_DIM_SERVICE.REMOVE_SERVICE_BAND(59,12,0,0)
HRI_EDW_DIM_SERVICE.REMOVE_SERVICE_BAND(0,720,0,0)
```

For an example of how to configure Period of Work Bands, see Example Configuration Script, page 2-14

Configuring Job Category Sets

The Job dimension uses a predefined job category set that you can configure to suit the reporting requirements of your enterprise.

Caution: If you do need to configure the job category sets, Oracle recommends that you do so before you initially load data into the data warehouse. See: Standard Data Warehouse Configuration, page 3-20

To add a job category set:

1. Use the following API call:

```
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY (job_category_set,job_category_1  
lookup,other_lookup)
```

API Parameters

- **job_category_set**

Use this parameter to specify the category set number.

- **job_category_lookup**

Use this parameter to define the lookup value for a job category to be included in the set.

- **other_lookup**

Use this parameter to define an “other” category for jobs with no associated job category in the set.

In each Job Category Set API call, either the other_lookup or the job_category_lookup must be null. This means that each job category and other lookup value require a separate API call.

Example

This example shows how to use API calls to add a job category set, Job Category Set 2, and associate it with the job categories Secretarial, General Administration, and an “other” category of Not Administration. The calls use the application utility lookups as shown in the following table:

Lookup Type	Lookup Code	Job Category (Lookup Meaning)
JOB_CATEGORY	SEC	Secretarial
JOB_CATEGORY	GA	General Administration
HRI_JOB_CATEGORY_SETS	NOT_ADM	Not Administration

To create the Job Category Set 2, you would need to follow this procedure:

1. Add the lookup code SEC with the meaning Secretarial to the Lookup Type JOB_CATEGORY.

2. Add the lookup code GA with the meaning General Administration to the Lookup Type JOB_CATEGORY.
3. Add the lookup code NOT_ADM with the meaning Not Administration to the Lookup Type HRI_JOB_CATEGORY_SETS.
4. Use the following API calls:

```
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY(2,'SEC',null)
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY(2,'GA',null)
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY(2,null,'NOT_ADM')
```

For an example of how to configure Job Category Sets, see Example Configuration Script, page 2-14

To remove a job category set:

1. Use the following API call:

```
HRI_EDW_DIM_JOB.REMOVE_JOB_CATEGORY (job_category_set,job_category_lookup,other_lookup)
```

The parameters for this API are the same as those used to add job category sets. See Adding Job Category Sets above.

Example

To remove the category General Administration from Job Category Set 2, defined in the previous example, use the following API call:

```
HRI_EDW_DIM_JOB.REMOVE_JOB_CATEGORY(2,'GA',null)
```

This would remove only the General Administration category, leaving the Secretarial and Not Administration categories in place.

For an example of how to configure Job Category Sets, see Example Configuration Script, page 2-14

Configuring Person Types

The Person Type dimension models the hierarchy based on the system and user person types on the Oracle HR transactional tables. The system person types could be, for example, Employee, Applicant, and Dependent; the user values enable you to configure different categories of these person types, for example, Night Worker (Employee) or Day Worker (Employee). It is possible for a person to have many different person types provided there is only one category of each system person type.

If you want to identify the person types on the warehouse, you need to map different categories of person type on the Oracle HR Transactional System to the desired person type on the warehouse. For example, you can map Agency Contractor (Employee) on the Oracle HR transactional tables to Agency Contractor on the warehouse. Without this mapping, the dimension simply identifies the Agency Contractor person type as an Employee type.

You need to map the following warehouse person types in this way:

- AGENCY_CONTRACTOR
- CONSULTANT
- SELF_EMP_CONTRACTOR
- FIX_TERM_UPPER

- FIX_TERM_LOWER
- INTERN
- PERMANENT

In the Person Type Dimension, if any of these types are matched, the Employee Flag is set to Yes and the corresponding person type column contains the person type name.

For example, if you map the Oracle HR Transactional System person type of Training Consultant to the warehouse type of Consultant, then for people having this person type the Employee Flag is Yes, the Consultant Type column (the corresponding person type column) displays Training Consultant, and the Employee Type column is blank.

If you do not set up person type mappings, all employee person types appear in the Employee Type column, and the Consultant Type column is blank).

To add a person type mapping:

1. Use the following API call:

```
HRI_EDW_DIM_PERSON_TYPE.INSERT_USER_ROW (system_person_type,user
_person_type,map_to_type)
```

API Parameters

- **system_person_type**

Use this parameter to define the person type with a system-generated person type.

- **user_person_type**

Use this parameter to define the person type with a user-defined person type.

- **map_to_type**

Use this parameter to specify one of the following EDW categories:

- AGENCY_CONTRACTOR
- CONSULTANT
- SELF_EMP_CONTRACTOR
- FIX_TERM_UPPER
- FIX_TERM_LOWER
- INTERN
- PERMANENT

You can map a system_person_type/user_person_type combination to only one of the above map_to_type categories.

Example

To map a person type of Contractor, defined as a system person type of Employee, to the EDW map_to_type category of AGENCY_CONTRACTOR, use the API call as follows:

```
HRI_EDW_DIM_PERSON_TYPE.INSERT_USER_ROW ('EMP','Contractor','AGEN
CY_CONTRACTOR')
```

With this mapping, the collection process for the Person Type Dimension loads people with the person type of contractor (EMP) into the Data Warehouse as agency contractors.

For an example of how to configure Person Types, see Example Configuration Script, page 2-14

To remove person type mappings:

1. Use the following API call:

```
HRI_EDW_DIM_PERSON_TYPE.REMOVE_USER_ROW (system_person_type,user_person_type)
```

Example

For example, to remove the person type mapping in the example above, you would use the API call as follows:

```
HRI_EDW_DIM_PERSON_TYPE.REMOVE_USER_ROW ('EMP','Contractor')
```

For an example of how to configure Person Types, see Example Configuration Script, page 2-14

Populating Facts and Dimensions

To populate the data warehouse module facts and dimensions you need to run collect and load programs.

For detailed information on the data warehouse collect and load programs, see: Processes to Populate the Data Warehouse Module, page 3-18

Use the Submit Requests window.

To run a collection or load program:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select the name of the collect or load program you want to run.
3. Submit your request.

What's Next

You can use the schedule options to define when you want to run the collect and load programs.

Deploy Daily Business Intelligence for HR

Deploy Daily Business Intelligence for HRMS

Use the procedures in this topic in conjunction with the implementation steps to successfully set up Daily Business Intelligence for HRMS.

Programs to Populate DBI Base Summary Tables

HRMSi provides two requests sets of concurrent programs to load and refresh the summary data structures used by the HR Management page. You can run the concurrent programs separately if required. The request sets and programs are detailed below.

HR Management Initial Request Set

Use the Request Set Generator to generate this request set. See: Generating HR Management Page Request Sets., page 3-47

Use this request set to load the initial summary data, and fully refresh the base summary tables used by DBI for HRMS.

The concurrent programs included in this request set are:

- HRI Load All Geography Category Structures, page 3-30
- HRI Load All Job Hierarchies, page 3-30
- HRI Load All Supervisor Hierarchies, page 3-31
- HRI Load Salary Base Summary, page 3-33
- HRI Load Separation Reasons Table, page 3-33
- HRI Load WMV Budget Base Summary, page 3-33
- HRI Load WMV Changes Base Summary, page 3-34
- HRI Load WMV Count Base Summary, page 3-35
- HRI Load WMV Separations Base Summary, page 3-35
- HRI Load Workforce Measurement Value History, page 3-35

HR Management Incremental Request Set

Use the Request Set Generator to generate this request set. See: Generating HR Management Page Request Sets., page 3-47

Use this request set to update the summary data, and fast refresh the base summary tables used by DBI for HRMS.

Note: Typically you run the Incremental Request Set at frequent intervals to capture changes in your tables. You should also run these programs together in the order specified in the request set.

The concurrent programs included in this request set are:

- HRI Load All Geography Category Structures, page 3-30
- HRI Load All Job Hierarchies, page 3-30

- HRI Load Separation Reasons Table, page 3-33
- Update Person Dimension (OLTP), page 3-37
- Update Salary Base Summary, page 3-37
- Update WMV Budget Base Summary, page 3-37
- Update WMV Changes Base Summary, page 3-38
- Update WMV Count Base Summary, page 3-38
- Update Workforce Measurement Value Base Metric (OLTP), page 3-38

HRI Load All Geography Category Structures

Run the HRI Load All Geography Category Structures concurrent program in order to populate the geography dimension with values. This concurrent program populates the location information stored in the HR_LOCATIONS_ALL table into a separate summary table.

Note: DBI for HRMS partially uses the geography hierarchy in the current release. It will fully use this hierarchy in future releases.

Parameters

The HRI Load All Geography Category Structures concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any geography changes occurring (date effectively) between these dates in the summary table.

This date range initially defaults to be the last five years. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the system date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the dimension again for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).

If you set Full Refresh to No, the program collects data in the incremental mode and that means it inserts changed records without purging the table.

Run Frequency

Oracle recommends that you run the HRI Load All Geography Category Structures concurrent program infrequently in full refresh mode, and frequently in incremental mode to reflect changes in the geography hierarchy in your enterprise.

If a system failure occurs, you must restart the process.

HRI Load All Job Hierarchies

The HRI Load All Job Hierarchies concurrent program populates the Job Hierarchy Summary Table with job hierarchy data.

Parameters

This program has the following parameter:

- **Full Refresh Yes/No**

If you set Full Refresh to Yes, the program deletes all information previously held in the summary table, and will recalculate the entire job hierarchy.

If you set Full Refresh to No, the program deletes none of the existing table information. It updates the summary table incrementally with any job hierarchy changes that occurred since the last refresh.

If you make changes to Job Family or Job Function values, you need to run the program in Full Refresh mode.

Run Frequency

Oracle recommends that you run the HRI Load All Job Hierarchies concurrent program infrequently in full refresh mode, and frequently in incremental mode to reflect changes in the job hierarchy in your enterprise.

If a system failure occurs, you must restart the process.

HRI Load All Supervisor Hierarchies

The HRI Load All Supervisor Hierarchies concurrent program populates the Supervisor Hierarchy Summary Table with current and historic supervisor hierarchy data.

Note: The program only collects the relationships between primary assignments in order to structure the supervisor hierarchy.

Parameters

HRI Load All Supervisor Hierarchies concurrent program has the following parameters:

- **Full Refresh – Yes / No**

If you set Full Refresh to Yes, the program deletes all information previously held in the summary table, and recalculates the supervisor hierarchy history for the entire collection date range specified (see the Collect From Date / Collect To Date parameters).

If you set Full Refresh to No, the program deletes none of the existing table information. It updates the summary table incrementally with any supervisor hierarchy changes that occurred within the collection date range specified (see the Collect From Date / Collect To Date parameters).

The program runs faster if you set the Full Refresh to No.

The default value of this parameter is Yes the first time the program is run, and No thereafter.

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any supervisor changes occurring (date effectively) between these dates in the summary table.

This date range initially defaults to be the last five years. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the current date.

Run frequency

At implementation, run the concurrent request, HRI Load All Supervisor Hierarchies, with the following parameter values:

Parameter	Implementation Value
Collect From Date	The earliest date required for supervisor information (default is five years previous). If you run this program from the DBI HR Management Initial Request Set, this date uses the Global start date.
Collect To Date	The current date (default)
Full Refresh	Yes (default)

After implementation, run the HRI Load All Supervisor Hierarchies concurrent program infrequently in full refresh mode, and frequently in incremental mode to capture and report on supervisor hierarchy changes in your enterprise (see the discussion on Full Refresh, above).

If a system failure occurs, you must restart the program

Error Handling

Loops in the supervisor hierarchy will cause the program to print an error message in the concurrent program log. A loop will occur if, for example, A supervises B, B supervises C, and C supervises A. In this case, the program will enter the person-IDs of the supervisors in the loop in the log.

Corrupt data may also produce error messages in the concurrent program log, for example, where an assignment has two date-tracked records that overlap, as shown in the table below:

Assignment With 2 Date-Tracked Records

Assignment Number	Start Date	End Date	Supervisor
10	1 Jan 2000	24 Apr 2000	Supervisor 1
10	1 Apr 2000	31 Dec 2000	Supervisor 2

In this example, the assignment records overlap on 1st to 24th April. To correct this situation, you should find the correct date of the Supervisor transfer, and update the assignment record. If, for example, the transfer occurred on the 25th April, the data should be corrected to:

Corrected Assignment With 2 Date-Tracked Records

Assignment Number	Start Date	End Date	Supervisor
10	1 Jan 2000	24 Apr 2000	Supervisor 1
10	25 Apr 2000	31 Dec 2000	Supervisor 2

HRI Load Salary Base Summary

This process deletes all rows from the shared summary table, that have the requisite columns set to identify them as WMV Budget Summary data rows. The process then recreates the summary data for each supervisor having budget records that fall within the date range specified by the parameters you pass to the process.

Parameters

This program uses the following parameters.

- **Start Date:** Start date of the period for which to collect summary information (e.g. one year ago).
- **End Date:** End date of the period for which to collect summary information (e.g. today's date).

HRI Load Separations Reason Table

This concurrent program collects formula definitions for voluntary and involuntary separation reasons into a table to improve reporting performance.

Parameters

This concurrent program has no parameters.

Run Frequency

At implementation you need to run the HRI Load Separation Reasons Table concurrent program in order to initially populate the Separation Reasons table.

Thereafter, Oracle recommends that you run the HRI Load Separations Reasons Table concurrent program only after changes to the HR_MOVE_TYPE formula.

Note: If you have EDW implemented then it is recommended that you never schedule the HRI Load Separation Reasons Table process to run regularly. It should only be run on an ad-hoc basis when the full implications on the Workforce Separation fact re-collection are understood and accepted.

HRI Load WMV Budget Base Summary

This process deletes all rows from the shared summary table that have the requisite columns set to identify them as WMV Budget Summary data rows. The process then recreates the summary data for each cost center supervisor having budget records that fall within the date range specified by the parameters you pass to the process.

Parameters

This program uses the following parameters:

- **Start Date:** Start date of the period for which to collect summary information (e.g. one year ago).
- **End Date:** End date of the period for which to collect summary information (e.g. today's date).

HRI Load WMV Changes Base Summary

This program truncates the Workforce Activity Changes table and re-collects workforce activity changes such as new hires, terminations and transfers by supervisor at a point in time.

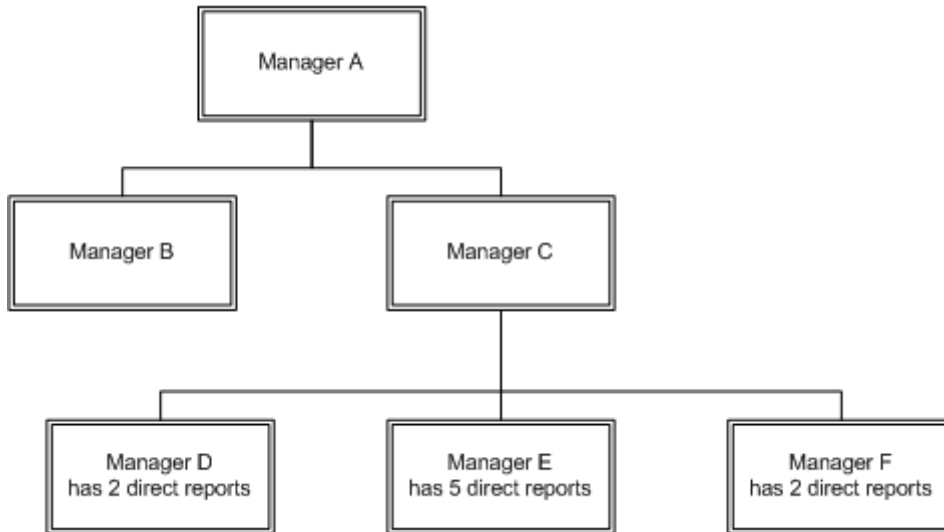
When calculating the total transfers into a supervisor hierarchy, the program only includes subordinates that were previously from a different supervisor hierarchy.

When calculating the total transfers out of a supervisor hierarchy, the program only includes subordinates that are going to report to a different supervisor hierarchy.

If an employee transfers within the current supervisor hierarchy, the program calculates the transfer as one transfer out of the hierarchy of the employee's previous immediate supervisor, and as one transfer into the hierarchy of the employee's current immediate supervisor.

If an employee transfers within the current supervisor hierarchy, together with his subordinates, the program calculates the total number of transfers out of the hierarchy of the employee's previous immediate supervisor, and the total number of transfers into the hierarchy of the employee's current immediate supervisor.

For example, consider the following hierarchy, where A manages B and C, and C manages D, E, and F, and E manages 5 employees.



If manager E, with 5 direct reports, transfers supervisor from manager C to manager B, the program will calculate that 6 people have transferred into B's hierarchy, and 6 people have transferred out of C's hierarchy. No employees will have transferred into or out of manager A's hierarchy.

Parameters

There are no parameters for this concurrent program. The program collects data from the date set in the system profile BIS:Global Start Date to the system date

HRI Load WMV Count Base Summary

This process truncates the headcount summary collection and re-collects the headcount data by supervisor, job and location.

Parameters

This program uses the following parameters:

- **Start Date:** Start date of the period for which to collect summary information.
- **End Date:** End date of the period for which to collect summary information.

HRI Load WMV Separations Base Summary

This program deletes all rows from the shared summary table, that have the requisite columns set to identify them as Annualized Summary data rows. The program then recreates the summary data from separations that fall within the date range specified by the parameters you pass to the process.

Parameters

This program uses the following parameters:

- **p_start_date:** Start date of the period for which to collect summary information (for example, one year ago).
- **p_end_date:** End date of the period for which to collect summary information (for example, today's date).

HRI Load Workforce Measurement Value History

Many reports use Workforce Measurement Values (WMVs), for example, Workforce Losses, Workforce Gains, and Workforce Count. WMVs include headcount and full-time equivalent (FTE) assignment budget values. Calculation and collection of this data could involve repeatedly running a formula for each assignment every time a report is run, which is expensive and increases the time taken to display the report.

To reduce the number of times the formula is run, a summary table exists which holds a history of the FTE and headcount WMVs for all assignments over the collection date range. The table ensures you are getting the best possible performance from your reports.

You can choose whether to collect FTE WMVs, headcount WMVs, or both FTE and headcount WMVs.

You need to populate the summary table with the WMVs used by your reports. To populate the table, you need to run the concurrent program HRI Load Workforce Measurement Value History.

The HRI Load Workforce Measurement Value History request is not used by all reports; some reports still calculate WMV at the time of running.

Parameters

The concurrent program HRI Load Workforce Measurement History uses the following parameters:

- **Full Refresh – Yes / No**

If you set Full Refresh to Yes, the program will delete all information previously held in the summary table, and will recalculate the WMV history for all assignments over the entire collection date range specified (see the Collect From Date / Collect To Date parameters). Use this mode the first time you run the program.

If you set Full Refresh to No, the program will delete none of the existing table information. It will update the summary table incrementally with any WMV changes that occurred within the collection date range specified (see the Collect From Date / Collect To Date parameters).

The program will run faster if you set the Full Refresh to No.

The following constraints apply:

- If WMVs are updated in the forms interface, the summary table will not reflect this change until you re-run the program, and only if you include the effective date of the correction (not the actual date the correction was made).
- The summary table will not reflect historical changes prior to the start date if you run the program in incremental mode.

For example, if the collection date range includes today but does not include last year, the program will not pick up changes made today that update WMVs date-effectively last year.

Due to these constraints you should run the full refresh program weekly or monthly to ensure that the WMV history table is correct. If there are no corrections, deletions, or historical/backdated changes, (for example, if you implement WMVs by a formula only, and do not directly store values for an assignment using the forms interface) running the incremental update at consecutive time periods will keep the table up to date.

The default value of this parameter is Yes the first time you run the program, and No thereafter.

- **Collect From Date / Collect To Date**

This parameter defines the start and end dates of the collection range. The program stores any WMV changes occurring (date effectively) between these dates in the WMV summary table.

This date range initially defaults to be the previous year. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the current date.

- **Collect FTE (Yes / No)**

This parameter defines whether or not you wish to collect or update the WMV summary table with Full Time Equivalent values.

The default value for Collect FTE is Yes.

- **Collect Headcount (Yes/No)**

This parameter defines whether or not you wish to collect or update the WMV summary table with Headcount values.

The default value for Collect Headcount is Yes.

Run frequency

On implementation, run the concurrent request HRI Load Workforce Measurement Value History with the following parameters:

Parameter	Implementation Value
Collect From Date	The earliest date required for WMV information.
Collect To Date	The current date (default)
Full Refresh	Yes (default)
Collect FTE	Yes (if FTE is used in reporting)
Collect Headcount	Yes (if Headcount is used in reporting)

Thereafter, Oracle recommends that you run the HRI Load Workforce Measurement Value History concurrent program monthly or weekly to capture and report on workforce measurement value changes in your enterprise (see discussion on Full Refresh below).

If a system failure occurs, you must restart the program.

Update Person Dimension (OLTP)

This concurrent program populates the supervisor hierarchy in an incremental mode. The program identifies the last collection date of the base summary and populates the base summary from that date to the current system date.

Parameters

There are no parameters for this request.

Update Salary Base Summary

This concurrent program collects salary information for the direct report employees of a supervisor by location and job in incremental mode.

Parameters

There are no parameters for this request. The program identifies the last collection date of the base summary and populates the base summary from that date to the current system date.

Update WMV Budget Base Summary

This concurrent program refreshes the WMV Budget materialized view.

Parameters

There are no parameters for this request. The program identifies the last collection date of the base summary and populates the base summary from that date to the current system date.

Update WMV Changes Base Summary

This concurrent program collects workforce activity changes such as new hires, terminations and transfers by supervisor in incremental mode.

Parameters

There are no parameters for this request. The program identifies the last collection date of the base summary and populates the base summary from that date to the current system date.

Update WMV Count Base Summary

This concurrent program collects headcount information for the direct report employees of a supervisor by location and job in incremental mode.

Parameters

There are no parameters for this request. The program identifies the last collection date of the base summary and populates the base summary from that date to the current system date.

Update Workforce Measurement Value Base Metric (OLTP)

This concurrent program populates the workforce measurement value base metric in incremental mode. The concurrent program is designed to run in parallel mode.

Parameters

There are no parameters for this request. The program identifies the last collection date of the WMV Base Metric and populates the base summary from the last collection date to the system date.

Checking DBI Global Parameters

Before you run DBI reports, use the Global Parameters window to check that the following DBI global parameters are set up to suit your enterprise.

- Primary Currency

Note: Currency exchange rates are defined in Oracle General Ledger. A currency exchange rate should exist for each currency you are planning to summarize in Daily Business Intelligence. See: *Entering Daily Rates*, *Oracle General Ledger Users' Guide*

- Primary Rate Type
- Global Start Date

See: Implement Global Parameters in *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Checking BIS System Profiles

Before you run DBI reports, check that the BIS profiles are set up to suit your enterprise.

To check the BIS system profiles:

Use the System Profile Values window.

1. In the Find System Profile Values window, find each of the following system profiles:

System Profile	Value (examples)
Workforce Measurement Type	Headcount
HRMS: Workforce Turnover Calculation Method	Workforce End (the annualized turnover calculation will use the headcount at the end date of the reporting period). Workforce Start + End Average (the annualized turnover calculation will use the average of the headcount at the start date and the headcount at the end date of the reporting period).

2. Ensure each system profile option is set correctly.

Configuring Workforce Calculations Using Oracle FastFormula

Typically you set up an assignment budget value for each employee assignment, and reports use this value to calculate workforce numbers. However, if you do not enter an assignment budget value for an assignment, reports use a formula to calculate workforce.

By default reports use the `TEMPLATE_FTE` and `TEMPLATE_HEAD` formulas. Copy and amend these formula templates to change the way you calculate workforce, or to report on other budget measurement types.

Important: If you copy and amend formulas, you must do so for all business groups within your enterprise. If you are using the default template formulas, this does not need to be copied to other business groups.

To configure workforce calculations:

Use the Formula window.

1. Select either the `TEMPLATE_HEAD` or `TEMPLATE_FTE` formula.
2. Click on Edit and copy the formula body.
3. Create a new formula called either `BUDGET_HEAD` or `BUDGET_FTE`, depending on which template you are copying.
4. Click on Edit and paste in the contents of the template you have copied.
5. Edit the formula code as required.

For further information on naming and amending these formulas, see: *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

6. Compile the new formula.

Repeat the above steps for each business group within your enterprise.

Defining Separation Categories

The Workforce Separations KPI, Daily Business Intelligence for HRMS, and the EDW module of HRMSi use separation categories to count the number of employees leaving either voluntarily or involuntarily.

The formula, `HR_MOVE_TYPE_TEMPLATE`, categorizes your leaving reasons into voluntary and involuntary separation categories. You define separation categories as lookups of type `HR_LOSS_TYPE`.

The current categories are:

Lookup Codes and Meanings for HR_LOSS_TYPE (Separation Categories)

Lookup Code	Lookup Meaning
SEP_INV	Involuntary
SEP_VOL	Voluntary
SEP_MTL	Mutual
SEP_NA	Not Specified

Note: Currently the delivered KPIs and reports only support Involuntary and Voluntary as Separation Categories. Classifying Separation Reasons into the other categories (i.e. Mutual and Not Specified) does not affect the reports, so the information in the reports may be incorrect.

You can define separation reasons as any lookup of type `LEAV_REAS`.

You attribute your separation reasons to separation categories by amending a formula. The formula is run by the HRI Load Separation Reasons Table concurrent program. This program stores the results in a table to be used when you run a report or KPI.

1. **Categorize Separation Reasons**

Categorize Separation Reasons by copying the `HR_MOVE_TYPE_TEMPLATE` formula and saving it as `HR_MOVE_TYPE`. You can then amend the new formula if necessary.

See: *Categorizing Separation Reasons*, page 3-41

2. **Load Separation Reasons**

Once you are satisfied with the `HR_MOVE_TYPE` formula, run the concurrent program HRI Load Separation Reasons Table. You must run this program whether you have changed the formula or not.

See: *Loading Separation Reasons*, page 3-42

Categorizing Separation Reasons

The HR_MOVE_TYPE_TEMPLATE formula categorizes your Separation Reasons into Separation Categories. You use the formula in conjunction with the HRI Load Separation Reasons Table concurrent program to populate a table. DBI for HRMS gathers separation reasons from this table. This setup provides flexibility and improves performance.

You can configure and extend the HR_MOVE_TYPE_TEMPLATE formula as necessary to categorize new Separation Reasons or re-categorize existing Separation Reasons by copying the template formula and renaming it to HR_MOVE_TYPE.

The important lines in the template formula text are:

- **termtype='V'**
This defaults the separation category to voluntary (V), if a specific leaving reason is not given.
- **IF leaving_reason = 'R' THEN termtype = 'V'**
This ensures that where retirement (R) is given as leaving reason, the formula returns a voluntary (V) separation category.
- **IF leaving_reason = 'D' THEN termtype = 'V'**
This ensures that where death (D) is given as the leaving reason, the formula returns a voluntary (V) separation category.
- **IF leaving_reason = 'G' THEN termtype = 'I'**
This ensures that where gross misconduct (G) is given as the leaving reason, the formula returns an involuntary (I) separation category.
- **RETURN termtype**
Returns the separation category.

If you add a new leaving reason to the formula, you must have previously defined it in the lookup type LEAV_REAS. Leaving reasons are associated with categories, where termtype represents the category. You can only use categories of V for Voluntary, or I for Involuntary.

If you have defined a leaving reason in the lookup type but not added it to the formula, it will default to category V for Voluntary.

Note: The HR_MOVE_TYPE formula is used in a number of other reporting areas. If you change the formula content, those reports will also change. It is currently being used by Embedded Data Warehouse (EDW). If you have implemented EDW, then changing this formula could affect the collection of data into the EDW fact tables. Please refer to the relevant HRMSi EDW documentation on this.

Perform this optional step from the Setup Business Group.

To categorize Separation Reasons:

You must use a responsibility that has Setup Business Group set for the HR: Business Group profile option.

Use the Formula window.

1. Select the HR_MOVE_TYPE_TEMPLATE formula.

2. Click on Edit and copy the formula body.
3. Create a new formula called HR_MOVE_TYPE.
4. Click on Edit and paste in the HR_MOVE_TYPE_TEMPLATE template contents.
5. Edit the formula code to add new leaving reasons, or re-categorize existing leaving reasons.
6. Compile the new formula.

Loading Separation Reasons

The HR_MOVE_TYPE formula categorizes your Separation Reasons into Separation Categories. The concurrent program HRI Load Separation Reasons Table runs the formula and stores the results in a table to be used when a report or KPI is run.

Whether you amend the formula or not, you must run the concurrent program HRI Load Separation Reasons Table.

Note: HRI Load Separation Reasons Table is included in the HRI DBI Update Request Set and the HRI DBI Initial Load Request Set. The program therefore runs automatically when you run either of these request sets.

To Load Separation Reasons:

Use the Submit Requests window.

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load Separation Reasons Table.
3. Submit your request.

What's Next

After implementation, only run the HRI Load Separations Reasons Table concurrent program after changes to the HR_MOVE_TYPE formula.

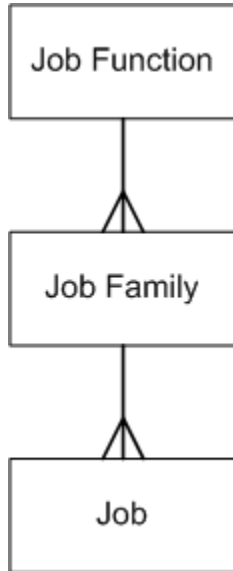
For further information on this concurrent program, see: HRI Load Separations Reason Table, page 3-33

Note: If you implement EDW, do not schedule the HRI Load Separation Reasons Table process to run regularly. Run this process only as needed when the full implications on the Workforce Separation fact re-collection are understood and accepted. See: Processes to Populate the Data Warehouse Module, page 3-18

Setting Up the Job Hierarchy

You can use links in the Salary report to drill to more detailed reports.

For the drill reports from the Salary report to fully function, you need to set up Job Functions and Job Families within a hierarchical structure. Job Function is the parent of Job Family, and Job Family is the parent of Job.



Oracle DBI for HRMS associates a Job Family with a Job Function if a Job is associated with both the Job Family and the Job Function. You define both Job Function and Job Family using segments in the Job key flexfield. Typically, you set up Job Family as dependent on Job Function.

When you drill from the Job Function to the Job Family report, the report displays only those Job Families that are associated with the Job Function.

1. Define Job Function and Job Family value sets

If you have not done so already, define Job Function and Job Family value sets for the Job key flexfield.

Select one of the following Validation Types for each value set:

- **Table:** The validation SQL must be valid and the WHERE clause cannot contain any non-contextual conditions (these can be pushed into the underlying object using a view).
- **Independent:** You can use this validation type for the Job Function value set, instead of Table validation type.
- **Dependent:** If you used Independent validation type for Job Function, you can use this validation type for the Job Family value set.

Note: If you add or remove Job Family or Job Function values in the future, run HR Management Initial Request Set or HR Management Incremental Request Set to update the DBI base tables. See: *Populating DBI Summary Data Structures*, page 3-48

Use the Value Sets window.

See: *Defining Value Sets, Oracle Applications Flexfields Guide*

2. Define the Job Key Flexfield Structure

If you have not done so already, associate the Job Family value set with the Job Family segment of the Job Key Flexfield structure. Associate the Job Function value set with the Job Function segment of the Job Key Flexfield structure.

Use the Key Flexfield Segments window.

See: *Defining Key Flexfield Structures, Oracle Applications Flexfields Guide*

3. **Structure the Job Hierarchy**

Associate your Job Family and Job Function value sets with the HR: BIS Job Hierarchy – Job Grouping Level 1 and the HR: BIS Job Hierarchy – Job Grouping Level 2 profile options to structure your Job Hierarchy.

Use the System Profile Values window.

See: *Structuring the Job Hierarchy, page 3-44*

4. **Associate Jobs with a Job Family and Job Functions**

For your jobs to be structured within the Job Hierarchy, you need to associate each job with a Job Family and a Job Function. Use the Job Name field of the Job window.

See: *Defining a Job, Oracle HRMS Enterprise and Workforce Management Guide*

5. **Check the Job Hierarchy Setup**

If you selected Table validation of your value sets, check your Job Function and Job Family hierarchy setup. To check the setup, populate the database tables and views. You can then query the associated views to ensure they have been populated with job function and job family values, and check that their performance is efficient.

See: *Checking the Job Hierarchy Setup, page 3-44*

Structuring the Job Hierarchy

Use your Job Family and Job Function value sets to structure your Job Hierarchy.

Use the HR: BIS Job Hierarchy – Job Grouping Level 1 profile option to define your Job Function value set as the first level in the Job hierarchy. Use the HR: BIS Job Hierarchy – Job Grouping Level 2 profile option to define your Job Family value set as the second level.

To associate value sets with profile options:

Use the System Profile Values window.

1. In the Find System Profile Values window, find the HR: BIS Job Hierarchy – Job Grouping Level 1 Profile Option.
2. At Site Level, enter the name of your Job Function value set.
3. In the Find System Profile Values window, find the HR: BIS Job Hierarchy – Job Grouping Level 2 Profile Option
4. At Site Level, enter the name of your Job Family value set.

Checking the Job Hierarchy Setup

Perform this check if you selected Table validation of your Job Function and Job Family value sets. To check your Job Function and Job Family hierarchy setup, populate the database tables and views by running the HRI Load All Job Hierarchies process.

Note: You only need to run this process to check your setup. You normally populate the Job Hierarchy when you run the HR Management

Initial Request Set and the HR Management Incremental Request Set. See: Programs to Populate DBI Summary Data Structures, page 3-29

You can then query the associated views to ensure they have been populated with job function and job family values, and check that their performance is efficient.

Be aware that if you did not associate Jobs with a given Job Family or Function, when you drill on the Headcount value on the Salary report, the Job Function column may have the value of Unassigned.

1. Check the Job Hierarchy structure setup.
See: Checking the Job Hierarchy Structure Setup, page 3-45
2. Check the Job Hierarchy database setup.
See: Checking the Job Hierarchy Database Setup, page 3-45

Checking the Job Hierarchy Structure Setup

Once you have set up the Job hierarchy, if you are using table validation of the value sets, check your Job Function and Job Family hierarchy setup. To check the Job Hierarchy structure, populate the database tables and views by running the HRI Load All Job Hierarchies process.

To check the Job Hierarchy structure setup:

Use the Submit Requests window.

1. Run the HRI Load All Job Hierarchies process in full refresh mode.
2. Check the process log for errors and warnings.

Checking the Job Hierarchy database setup

Once you have checked the Job hierarchy structure, if you are using table validation of the value sets, check the Job Hierarchy database setup.

Check the performance of the views derived from the validation SQL by analyzing:

```
SELECT * FROM hri_cl_job_family_v WHERE id = :id;  
SELECT * FROM hri_cl_job_function_v WHERE id = :id;
```

Enabling the Payroll Events Model

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) can limit data refreshes to new or changed records in Oracle Human Resources since the last refresh.

Complete the following procedures to enable the Payroll Events Model:

1. **Enable Dynamic Triggers**
Ensure that the triggers that update the summary data structures are uploaded and compiled. These triggers may not be enabled or compiled if you have installed HR in standalone mode, or if you are not using Salary Administration to maintain salaries.

Enable each of the following dynamic triggers, enable the trigger components for each trigger, and regenerate the triggers.

Application Name	Table Name	Triggering Actions
Oracle Human Resources	PER_ALL_ASSIGNMENTS_F	Update
Oracle Human Resources	PER_ASSIGNMENT_BUDGET_VALUES_F	Update, Insert
Oracle Payroll	PAY_ELEMENT_ENTRIES_F	Update, Insert, Delete

Use the Dynamic Trigger Generation window.

See: *Defining Dynamic Triggers, Oracle HRMS Payroll Processing Management Guide*

2. **Activate Triggers for All Business Groups**

Ensure the triggers that update your summary data structures are activated for all business groups.

Use the Functional Area Maintenance window.

See: *Ensuring Triggers are Activated for all Business Groups, page 3-46*

Ensuring Triggers are Activated for all Business Groups

The following triggers update summary data structures with your changed records. Ensure they are activated for all business groups.

To ensure triggers are activated for all business groups:

Use the Functional Area Maintenance window.

1. In Query Mode, enter INCIDENT REGISTER in the Functional Area Name field.
2. Run the query.
3. In the Trigger Name field, find each of the following triggers:
 - PAY_ELEMENT_ENTRIES_F_ARD
 - PAY_ELEMENT_ENTRIES_F_ARI
 - PAY_ELEMENT_ENTRIES_F_ARU
 - PER_ALL_ASSIGNMENT_F_ARU
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARI
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARU
4. Click the Business Group tab. Ensure there is an entry for <All Business Groups>.

Populating the Time Dimension

Use the Update Time Dimension concurrent program to populate the time dimension. The time dimension supports the trend reports within DBI for HRMS.

The Update Time Dimension concurrent program populates the time dimension with time elements, depending on the calendar type you selected in the Enterprise Calendar global parameter.

Typically you update the time dimension so that data is available one to two years prior to the Global Start Date.

For information on the Enterprise Calendar global parameter, and the Global Start Date, see Implementing Global Parameters in *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Important: The time dimension is used by all Daily Business Intelligence pages and reports, so check with your functional and technical implementation experts before updating the time dimension.

This concurrent program is currently not in the full or incremental request sets for DBI for HRMS. It will be included in the request sets in future releases. This concurrent program may be included in request sets for other DBI areas.

Use the Submit Requests window.

To populate the Time dimension:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Update Time Dimension.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
From Date	This earliest date that you want to report on in DBI. This date defaults to the Global Start Date, but can be any date for which there are open periods in the Enterprise Calendar.
To Date	This is the latest date that you want to report on in DBI. This date defaults to the last open period defined in the Enterprise Calendar.

4. Submit your request.

After implementation, run this program in incremental mode from the last collection date to the end of the enterprise calendar.

Generating HR Management Page Request Sets

The HR Management page is based on data held in base summary tables and materialized views. To populate the base summary tables, you use programs that are organized into request sets. You need to generate the request sets required by the page.

Use the Refresh Business Intelligence Data by Pages window.

To generate the HR Management Initial Request Set:

1. Enter HR Management in the page name and click Go.

2. Enter a name for your request set, for example, HR Management Initial Request Set.
3. Select Analyze objects after refreshing.
4. Select Force full refresh for objects that have been collected.
5. In the Request set to create group, select Initial Refresh.
6. In the Pages and Portlets list, select HR Management.
7. Click Create.

To generate the HR Management Incremental Request Set:

1. Enter HR Management in the page name and click Go.
2. Enter a name for your request set, for example, HR Management Incremental Request Set.
3. Select Analyze objects after refreshing.
4. Deselect Force full refresh for objects that have been collected.
5. In the Request set to create group, select Incremental Refresh.
6. In the Pages and Portlets list, select HR Management.
7. Click Create.

Populating the DBI Base Summary Tables

To populate the DBI base summary tables with all your data, run the initial request set for the HR Management page. This request set purges the base tables and repopulates them.

To maintain the HR Management page after implementation is complete, you must run the incremental request set for the HR Management page at regular intervals.

Typically, you schedule the incremental request set to run periodically to update the base summary tables. If you want the data in the HR Management page to be accurate on a daily basis, you need to schedule the incremental request set to run daily.

The incremental refresh request set *does not* purge the underlying tables. It collects data from the last collection date.

To successfully run the incremental request set, you need to activate dynamic triggers. See: Enabling the Payroll Events Model, page 3-45

To purge and repopulate DBI Summary Data Structures:

Use the Submit Requests window.

1. Select Request Set in the Submit a New Request window.
2. In the Name field, select the name of your initial request set for the HR Management page and submit your request.

To schedule the incremental request set:

Use the Submit Requests window.

See: Submitting a Request

1. Select Request Set in the Submit a New Request window.

2. In the Name field, select the name of your incremental request set for the HR Management page and click Schedule.
3. In the Run the Job group, select Periodically.
4. Complete the schedule information as required.
5. Click OK and submit your request.

Related Topics

Programs to Populate DBI Base Summary Tables, page 3-29

Defining a Submission Schedule, *User, System Administrator, and Flexfields Help*

Glossary

360-Degree Appraisal

Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

360-Degree Self Appraisal

Part of the SSHR Appraisal function and also known as a Group Appraisal. This is a 360-Degree appraisal initiated by an employee. The employee (initiator) can add managers and reviewers to the appraisal.

Absence

A period of time in which an employee performs no work for the assigned organization.

Absence Types

Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual

The recognized amount of leave credited to an employee which is accumulated for a particular period.

Accrual Band

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Period

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Plan

See: *PTO Accrual Plan*, page Glossary-22

Accrual Term

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Activity Rate

The monetary amount or percentage associated with an activity, such as \$12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

AdvancePay

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

Alert

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Applicant

A candidate for employment in a Business Group.

Applicant/Candidate Matching Criteria

Matching functionality in the iRecruitment system that systematically identifies which candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

Apply for a Job

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Appraisal

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary- 3 .

Appraisee

A person being appraised by an appraiser..

Appraiser

A person, usually a manager, who appraises an employee.

Appraising Manager

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary- 8

Assessment

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary- 3 .

Assignment

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

Assignment Number

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

Assignment Rate

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of \$10.50.

Assignment Set

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-23

Assignment Status

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

Authoria

A provider of health insurance and compensation information, that provides additional information about benefits choices.

BACS

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balance Adjustment

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds

These are the input values of matching units of measure of any elements defined to feed the balance.

Balances

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-21

Bargaining Unit

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Currency

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Base Summary

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

Behavioral Indicators

Characteristics that identify how a competence is exhibited in the work context.

See also: *Proficiency Level* , page Glossary-22

Beneficiary

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

Benefit

Any part of an employee's remuneration package that is not pay. Vacation time, employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-11

Block

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-24, *Field*, page Glossary-12

Budget Measurement Type (BMT)

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

Budget Value

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group

The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

Business Number (BN)

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-12

Calendar Exceptions

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Calendars

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

Canada/Quebec Pension Plan (CPP/QPP) Contributions

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

Candidate Offers

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-25

Cash Analysis

A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

Ceiling

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Certification

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Child/Family Support payments

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement

A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Collective Agreement Grade

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

Communications

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-11

Compensation Object

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation objects include programs, plan types, plans, options, and combinations of these entities.

Competence

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competence*, page Glossary-29

Competence Evaluation

A method used to measure an employees ability to do a defined job.

Competence Profile

Where you record applicant and employee accomplishments, for example, proficiency in a competence.

Competence Requirements

Competencies required by an organization, job or position.

See also: *Competence*, page Glossary- 7 , *Core Competencies*, page Glossary- 8

Competence Type

A group of related competencies.

Configurable Forms

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

Consideration

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

Consolidation Set

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

Contact

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Content

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

Contingent Worker

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

Contract

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution

An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competence*, page Glossary- 7

Costable Type

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary- 3

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

Database Item

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary- 9 , *Effective Date*, page Glossary-10

DateTrack

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-10

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

Dependent

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

Deployment Factors

See: *Work Choices*, page Glossary-30

Derived Factor

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield* , page Glossary-15

Developer Descriptive Flexfield

A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country.

See also: *Extra Information Types*, page Glossary-12

Direct Deposit

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Discoverer Workbook

A grouping of worksheets. Each worksheet is one report.

Discoverer Worksheet

A single report within a workbook. A report displays the values of predefined criteria for analysis.

Distribution

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

Download

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Effective Date

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary- 9

EIT

See: *Extra Information Type*, page Glossary-12

Electability

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

Element Classifications

These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-24, *Nonrecurring Elements*, page Glossary-18

Element Link

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-27

Elements

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Set

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

Eligibility

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

Employee

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employee Histories

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

Employment Equity Occupational Groups (EEOG)

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Employment Insurance (EI)

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums

by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Enrollment Action Type

Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS

Employee Self Service. A predefined SSHR responsibility.

Event

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT)

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-10

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary- 5 , *Region*, page Glossary-24

Flex Credit

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

Flexible Benefits Program

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

Flexible Spending Account

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care

expenses. Annual monetary limits and use-it-or-lose-it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary- 5 , *Region*, page Glossary-24, *Field*, page Glossary-12

Full Time Equivalent (FTE)

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Global Value

A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type

A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

Grade Ladder

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

Grade Rate

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-19

Grade Step

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-13

Grandfathered

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

Group Certificate

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Hierarchy

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

Imputed Income

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, Metalink and Learning Management.

Initiator

In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions

An SSHR user assistance component displayed on a web page to describe page functionality.

Integrator

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

Involuntary

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

Job

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

Job Posting

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-10

Key Performance Indicator (KPI)

Target values that you set for the performance of your enterprise. This value comes from the corresponding KPI Portlet/Report. You can configure the Performance Management Framework to send a notification when actual performance falls short of, or exceeds, the target value. For example, you may configure the Performance Management Framework to send you a notification when workforce variance is greater than 10 percent, or when training success is below 50 percent.

Key Performance Indicator (KPI) Portlet/Report

Displays the executive summary of key measures such as total headcount and total salary.

Layout

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

Learning Management

Oracle's enterprise learning management system that administers online and offline educational content.

Leave Loading

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

Leaver's Statement

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Legal Employer

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

Life Event

A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

Life Event Collision

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linked PIWs

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

Linking Interval

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

LMSS

Line Manager Self Service. A predefined SSHR responsibility.

Long Service Leave

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

Lookup Types

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL)

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

Manager

(iRecruitment) A manager accesses the iRecruitment system to document their hiring needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

Manager-Employee Appraisal

Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

Maternity Pay Period

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Medicare Levy

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

Menus

You set up your own navigation menus, to suit the needs of different users.

My Account

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

NACHA

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

National Occupational Classification (NOC) code

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Net Accrual Calculation

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-24

North American Industrial Classification (NAIC) code

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

Not in Program Plan

A benefit plan that you define outside of a program.

OLM

Oracle Learning Management.

Online Analytical Processing (OLAP)

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

Online Transactional Processing (OLTP)

The storage of data from day-to-day business transactions into the database that contains operational data.

Open Enrollment

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Oracle FastFormula

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

Organization

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

OSSWA

Oracle Self Service Web Applications.

Outcome

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

Overrides

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

Parameter Portlet

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

Pattern

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-13

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-14

Payment Type

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

Payroll Reversal

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

Payroll Rollback

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

Payroll Run

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

People List

An SSHR line manager utility used to locate an employee.

Performance Management Framework (PMF)

A business intelligence tool used to alert users to exceptional circumstances, as defined by KPIs. When a particular factor measured by HRMSi goes beyond a threshold chosen by the user, the system sends the user a workflow notification.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

Performance (within Assessment)

An expectation of "normal" performance of a competence over a given period. For example, a person may exceed performance expectation in the communication competence.

See also: *Proficiency (within Assessment)*, page Glossary-21, *Competence*, page Glossary- 7 , *Assessment*, page Glossary- 3

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an organization. A contingent worker can have only one period of placement at a time although they can have multiple assignments during that time.

Period Type

A time division in a budgetary calendar, such as week, month, or quarter.

Personal Public Service Number (PPS)

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

Personal Tax Credits Return (TD1)

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and

SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

Person Search

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personnel Actions

Personnel actions is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

Plan Design

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Professional Information

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency (within Assessment)

The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level.

See also: *Performance (within Assessment)*, page Glossary-20, *Competence*, page Glossary- 7 , *Assessment*, page Glossary- 3

Proficiency Level

A system for expressing and measuring how a competence is exhibited in the work context.

See also: *Behavioral Indicators*, page Glossary- 4 .

Progression Point

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-19

Prospect Pool

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

Provincial/Territorial Employment Standards Acts

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number

In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

QPP

(See Canada/Quebec Pension Plan)

QA Organization

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

Qualification Type

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary- 7

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

Qualifying Days

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern

See: *SSP Qualifying Pattern*, page Glossary-27

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministère du Revenu du Québec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

An SSHR function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary- 3

QuickPay

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

Ranking

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

Rates

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rating Scale

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

See also: *Proficiency Level*, page Glossary-22

Record of Employment (ROE)

A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

Recurring Elements

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-18, *Standard Link*, page Glossary-27

Region

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary- 5 , *Field*, page Glossary-12

Registered Pension Plan (RPP)

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP)

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Registered User

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

Report Parameters

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set

A group of reports and concurrent processes that you specify to run together.

Requisition

The statement of a requirement for a vacancy or group of vacancies.

Request Groups

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-25

Residual

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary- 6

Responsibility

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-26, *User Profile Options*, page Glossary-30, *Request Groups*, page Glossary-24, *Security Groups*, page Glossary-24

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministère du Revenu du Québec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

Search by Date

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Security Group

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-25, *Security Profile*, page Glossary-26, *User Profile Options*, page Glossary-30

Security Groups Enabled

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

Security Profile

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities.

See also: *Responsibility*, page Glossary-25

Self Appraisal

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Site Visitor

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

SMP

See: *Statutory Maternity Pay*, page Glossary-28

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministère du Revenu du Québec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-28

SSP Qualifying Pattern

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard HRMS Security

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

Standard Link

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-11, *Recurring Elements*, page Glossary-24

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministère du Revenu du Québec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

Succession Planning

An SSHR function which enables a manager to prepare a succession plan.

Suitability Matching

An SSHR function which enables a manager to compare and rank a persons competencies.

Superannuation Guarantee

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

Tabbed Regions

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Tax Point

The date from which tax becomes payable.

Template Letter

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

Terminating Employees

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Rule

Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips

An SSHR user assistance component that provides information about a field.

Transcendentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard Competence

A competence that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

User Assistance Components

SSHR online help comprising tips and instructions.

User Balances

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary- 4

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-25, *Security Profile*, page Glossary-26

User-based Security

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

View

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

Viewer (SSHR)

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

Viewer (Web ADI)

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

Voluntary

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

Waiting Days

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

WCB Account Number

In Canada, this is the account number of the provincially administered Worker's Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Work Choices

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker

An employee or a contingent worker.

Worker's Compensation Board

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Worker's Compensation Board premiums are paid entirely by the employer.

Workflow

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Workforce Measurement Type (WMT)

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

Workforce Measurement Value (WMV)

A WMT value, for example, headcount or FTE.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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